Steelcase

Worldwide Office Environment Index Summary Report

Index de l'Environnement de Bureau Sommaire International

Zusammenfassung des weltweiten Büroumweltsindex

Résumé de l'Index d'Environnement de Bureau International

Reporte Resumido del Indice Mundial de Ambientes de Oficina

オフィス環境調査国際版サマリーレポート

The Steelcase Worldwide Office Environment Index 1991

The Steelcase Worldwide Office Environment Index, 1991, provides the first opportunity to compare worker attitudes and office environments around the world. Conducted by Louis Harris and Associates, Inc., the study reports the opinions of office workers, top executives, facilities managers, and contract design professionals in 15 countries, including the United States (U.S.), Canada, Japan, and the European Economic Community (EEC). The member countries of the EEC are Belgium, Denmark, France, Germany, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Spain, and the United Kingdom.

Current findings from the U.S. and Canada update the information and trends that have been gathered by the Office Environment Index since 1978. New data this year from the EEC and Japan provide a benchmark for future trends and comparisons in those countries.

Separate summary reports are available for the U.S., Canada, the EEC, and Japan. A comprehensive research report including data from all countries is also available.

"Workers" in this report refers to office workers in offices with 25 or more employees. "Executives" mentioned in the report are top executives in large private and public-sector organizations. Facilities managers (those persons responsible for managing the organizations' facilities, including planning, design, and construction) are drawn from the same organizations as top executives. "Designers" refers to contract design professionals in leading architectural and design firms. Interviews were conducted from January through April, 1991.

The Steelcase Worldwide Office Environment Index, 1991, is sponsored by the Steelcase Inc. family of companies, worldwide. The study was developed in conjunction with the institute of Business Designers (IBD) and the International Facility Management Association (IFMA).

L'Index Mondial de l'Environnement de Bureau 1991 de Steelcase

L'Index mondial de l'environnement de bureau 1991 de Steelcase offre pour la première fois la possibilité de comparer les attitudes des employés de bureau et d'étudier les environnements de bureau à l'échelle mondiale. Menée par la firme Louis Harris & Associés Inc., l'étude contient les opinions d'employés de bureau, de dirigeants, de gestionnaires d'établissements et de designers-conseils de 15 pays incluant les États-Unis, le Canada, le Japon et les pays de la Communauté économique européenne (Cée). Les pays membres de la Cée sont la Belgique, le Danemark, la France, l'Allemagne, la Grèce, l'Irlande, l'Italie, le Luxembourg, les Pays-Bas, le Portugal, l'Espagne et le Royaume-Uni.

Les informations recueillies aux États-Unis et au Canada permettent de mettre à jour les données accumulées depuis 1978 par l'Index de l'environnement de bureau. Les données supplémentaires de cette année en provenance de la Cée et du Japon fournissent une mesure étalon pour l'analyse comparative des tendances futures dans ces pays.

Des rapports condensés distincts sont également disponibles pour chacun de ces pays ou régions. Un rapport d'étude détaillé comprenant l'ensemble des données recueillies dans tous les pays est également disponible.

Le terme «travailleurs» dans la présente étude, s'applique aux employés de bureau oeuvrant dans des bureaux comptant plus de 25 personnes. Les «dirigeants» cités dans le rapport sont des cadres supérieurs de grandes organisations publiques et privées. Les gestionnaires d'établissements appartiennent à ces mêmes organisations, et les «designers» sont des designers-conseils appartenant à des sociétés réputées dans le domaine de l'architecture et du design d'intérieurs. Les entrevues ont été réalisées de janvier à avril 1991.

L'Index Mondial de l'Environnement de Bureau 1991 est commandité par le groupe d'entreprises qui forment Steelcase Inc. L'étude a été élaborée avec la participation de l'Institut des Designers Commerciaux (IBD) et l'Association internationale des Gestionnaires d'Établissements (IFMA).

Der weltweite Büroumweltindex des Jahres 1991 von Steelcase

Der weltweite Buroumweltindex des Jahre 1991 von Steelcase gibt die erste Moglichkeit fur einen Vergleich der Ansichten von Burokräften und der Buroumwelt uberall in der Welt. Die Firma Louis Harris and Associates, Inc. fuhrte Meinungsforschungen durch und befragte Burokräfte, Geschäftsleiter, Anlagenmanager und Innenarchitekten in 15 Landern, einschließlich der Vereinigten Staaten, Kanada, Japan und der Lander der Europaischen Gemeinschaft (EG-Landern). Die Mitgliedslander der Europäischen Gemeinschaft sind Belgien, Danemark, Deutschland, Frankreich, Griechenland, Großbritannien, Irland, Italien, Luxemburg, die Niederlande, Portugal und Spanien.

Daten aus den USA und Kanada erganzen das Wissen und die Kenntnisse der Trends, die durch den Buroumweltindex seit 1978 gesammelt wurden. Benchmark-Forschungen in Japan und Europa bringen nun eine Moglichkeit, zukunftige Trends vorauszusagen und Vergleiche dieser Länder durchzufuhren.

Die vorliegende Zusammenfassung berichtet und vergleicht die wesentlichsten Resultate fur die USA, Kanada, die EG-Lande und Japan, fur die auch getrennte Zusammenfassungen erstellt wurden. Ein umfassender Bericht mit vollstandigen Daten von allen Landern ist ebenfalls erhaltlich.

Der Begriff "Burokrafte" bezeichnet in diesem Bericht solche, die in Buros mit 25 oder mehr Mitarbeitern arbeiten. "Geschaftsleiter" sind Fuhrungkrafte in groß privaten und offentlichen Unternehmen u "Anlagenmanager" sind für die Anlagen, Planung und Gebaude derselben Firmen verantwortlich. "Innenarchitekten" oder "Designer" bezeichnen Mitarbeiter in fuhrenden Architektur – und Designfirmen, die unter Vertrag fur die befragen Firmen arbeiten. Interviews fanden von Januar b April 1991 statt. Weitere Details uber die Methodik der Umfragen sind in der jeweiligen Landes – oder Regionalzusammenfassung zu finden.

Der weltweite Buroumweltindex des Jahr 1991 wurde von der weltweiten Firmengruppe Steelcase Inc. durchgefuhrt. Diese Meinungsumfrage wurde zusammen mit Institute of Business Designers (IBD) und von der International Facility Management Association (IFMA) unternommen.

Study No. 902065

THE OFFICE ENVIRONMENT INDEX 1991:
SUMMARY OF WORLDWIDE FINDINGS

A Study Conducted for
Steelcase Inc.

Fieldwork: January-April 1991

Project Directors:

Merl W. Baker, President, Louis Harris and Associates (U.S.A.)
Erich Kramer, Senior Vice President
Sarah Dutton, Research Associate

Louis Harris and Associates, Inc.
630 Fifth Avenue
New York, New York 10111
(212) 698-9600

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ABOUT THIS STUDY

Since 1978, Steelcase Inc. has sponsored survey research exploring the office workplace -- the Office Environment Index. The OEI tracks the views of office workers, top executives, facilities managers, and office interior designers on a wide range of workplace issues regarding both how work is done and the physical office environment.

This sixth OEI was a worldwide undertaking, encompassing not only the U.S. and Canada but also the twelve countries of the European Economic Community and Japan. This report offers a comparative summary of the worldwide findings.

The findings are based on interviews with:

- 3,707 full-time office workers at organizations with at least 25 office employees at the branch or location where they work:
  - -- 1,008 in the U.S.
  - -- 250 in Canada
  - -- 1,449 in the European Economic Community
  - -- 1,000 in Japan
- 868 top executives of large private- and public-sector organizations:
  - -- 150 in the U.S.
  - -- 100 in Canada
  - -- 518 in the EEC
  - -- 100 in Japan
- 864 facilities managers at large private- and public-sector organizations:
  - -- 150 in the U.S.

  - -- 107 in Canada
  - -- 507 in the EEC
  - -- 100 in Japan

- o 687 contract interior designers:
  - -- 150 in the U.S.
  - -- 101 in Canada
  - -- 336 in the EEC (only in the U.K., France, Germany, and Spain)
  - -- 100 in Japan

This summary report compares the findings for each sample group from the U.S., Canada, Japan and a weighted total for the twelve countries of the EEC taken together. Four of the EEC countries -- the U.K., France, Germany (western), and Spain were oversampled to ensure statistically readable bases in each of those countries separately. The findings for those four EEC countries are reported in another volume. Contract interior designers were sampled in the U.S., Canada, and Japan, and in the four key EEC countries just enumerated. (Findings for interior designers in those four EEC countries appear in the separate volume on the EEC.) The EEC totals were created by weighting together findings from the twelve countries of the community according to each country's proportionate share of white collar workers in the EEC as reported by the Organization for Economic Cooperation and Development (OECD).

Interviews were conducted by telephone from January through April, 1991. Interviews with office workers averaged 25 minutes in length, while those with executives and designers averaged 20 minutes. In Japan, meeting these length limits required instruments five minutes shorter in English; selected questions were not asked in Japan.

The study was designed and conducted by Louis Harris and Associates in conjunction with Steelcase Inc., the Institute of Business Designers, and the International Facility Management Association.

Further details on the study method are provided in Appendix A.

HIGHLIGHTS FROM THE WORLDWIDE FINDINGS

- Despite Shortcomings, Office Workers in the U.S. and Canada Seem the Happiest, Those in Japan the Most Frustrated, and Those in the EEC Somewhere in Between

-- Office workers in the U.S. and Canada express a higher level of job satisfaction than do their counterparts in the EEC, while the lowest level of satisfaction is reported in Japan (43% of office workers in the U.S., 39% in Canada, 28% in the EEC, and only 17% in Japan are "very satisfied"). Office workers in Japan are also less likely than those in the U.S., Canada, and the EEC to say they are at least "somewhat satisfied" (76% in Japan vs. 87% in the EEC, and 84% in both the U.S. and Canada). One indication of management's inability to fully understand the mindset of office workers -- and this is true the world around -- is that they consistently underestimate the degree to which office workers are satisfied with their jobs.

-- The "aspiration gaps" between the importance office workers attach to specific job characteristics and the extent to which those characteristics are true of their current job tend to be narrowest in the U.S. and Canada, wider in the EEC, and widest in Japan. Over the sixteen characteristics tested, the average "gap" between the percentage who say each characteristic is "very important" to them and the percentage who report it "very true" on their current job is 27 percentage points in the U.S., 26 points in Canada, a higher 29 points in the EEC, and as wide as 45 points in Japan. To what extent does management understand these gaps between their office workers' aspirations and the degree to which they are fulfilled in the workplace? Asked how much importance their own office employees would attribute to each of the sixteen characteristics and how true their employees would find each to be in their own workplace, top executives in the U.S., the EEC, and Japan correctly estimate (or overestimate) the "aspiration gaps" reported by office workers themselves on only a handful of characteristics; in Canada, they correctly estimate or overestimate the gap on over half of the characteristics.

-- Europe shows the highest proportion of office workers who perceive "a great deal" of connection between doing their job well and getting the things the most want out of life (65%); the readings for the U.S. and Canada are somewhat lower (both 53%), while office workers in Japan are least likely (31%) to see such a linkage. Top executives in the U.S., Canada, and the EEC tend to underestimate the degree to which office workers feel a linkage between their job performance and getting what they want out of life, but Japanese top executives tend to overestimate the sense of linkage experienced by office workers.

-- Despite other indications of extreme dissatisfaction, Japanese office workers are far less likely to say they're working at maximum capacity and more likely to say they could probably be more productive than are their counterparts in the U.S., Canada, or the EEC. Only 23% of Japanese office workers, compared with 48% in the U.S., 58% in Canada, and 48% in the EEC believe they and their work colleagues "certainly do as much as they can," while 32% in Japan, compared with 26% in the U.S., 23% in Canada, and 26% in the EEC feel they "could probably do more." Top management everywhere -- even in Japan -- underestimates the extent to which office workers feel they are doing as much work as they can. However, the findings confirm that Japanese office workers put in longer hours each week (a median of 45 hours) than their counterparts in the U.S., Canada, or the EEC (all 40 hours).

o The U.S. Lags, Japan and the EEC Lead on International Involvement

-- From the accounts of top executives at large organizations, U.S. companies have less involvement in international activities than those in any other country under study. Canadian organizations have a considerably more substantial international orientation, but organizations in the European Economic Community and Japan outpace those in either North American country on each of four measures of international activity. These measures include: facing competition from foreign companies (25% of top executives in U.S. organizations for which the question is applicable say their company faces such competition, compared with 53% of their counterparts in Canada, 72% in the EEC, and 67% in Japan); participating in joint ventures with companies in other companies (24% in the U.S., 42% in Canada, 64% in the EEC, 71% in Japan); exporting products or services (17% in the U.S., 43% in Canada, 67% in the EEC, 66% in Japan); and having wholly-owned facilities in other countries (13% in the U.S., 21% in Canada, 66% in the EEC, 65% in Japan).

o Surprisingly, Japan Lags Behind the West on Employee Participation and Total Quality Management in the Office Workplace

-- While the Japanese industrial environment may embody the principles of participative management, the Japanese office environment appears not to, as yet. Office workers in Japan report a 45-percentage-point aspiration gap on being able to contribute significantly to the organization (compared with only 12 points in the U.S., 15 points in Canada, and 18 points in the EEC); a 50-point gap on being encouraged to work in teams (compared to 14 points in both the U.S. and Canada and 25 points in the EEC); a 48-point gap on having a challenging job (compared with 17 points in the U.S., 19 points in Canada, and 18 points in the EEC); a 53-point gap on management recognition of employee contributions (compared with 37 points in the U.S., 36 points in Canada, and 41 points in the EEC); a 43-point gap on being encouraged to participate in problem-solving (compared with 30 points in the U.S., 29 points in Canada, and a higher 37 points in the EEC). By way of shortfalls on recognition, it should be noted that office workers in Japan also show a 56-point gap on good pay (compared with 21 points in the U.S., 23 points in Canada, and 27 points in the EEC) and a 46-point gap on good employee benefits (compared with 17 points in the U.S., only 1 point in Canada, and 14 points in the EEC).

-- Japanese office workers are much more likely than their counterparts in the U.S., Canada, and the EEC to report that their regular work mode involves being "pretty much told what to do and how to do it" (23% in Japan, compared with 9% in the U.S., 7% in Canada, and 10% in the EEC).

-- Perhaps the larger context for the notion of the participative workplace is the concept of "total quality management," or TQM. To judge from the findings, the concept has gained a firm foothold in North America, has made some inroads in the EEC countries, but is not yet established in the Japanese office environment. Fully 80% of office workers in the U.S. and 80% in Canada, but a lower 65% in the EEC and 63% in Japan report their organization "fosters the notion of 'continuous improvement' of the work and the way things are done in the office"; 78% in the U.S., 68% in Canada, 56% in the EEC, and 48% in Japan say their organization "measures the satisfaction of...[your] office's customers or clients, either external or internal"; on a lower tier of response in all countries, 67% of office workers in the U.S., 62% in Canada, and as few as 40% in the EEC and 33% in Japan report their organization has a "'do-it-right-the-first-time' philosophy for office work"; 63% in the U.S. and 62% in Canada, but a lower 41% in the EEC and 33% in Japan say their organization "measures office worker productivity." Offering office workers incentive compensation linked to the quality of their work is the one form of TQM which Japanese office workers (39%) are as likely as their counterparts in the U.S. (40%) -- and more likely than office workers in Canada (31%) and the EEC (32%) -- to report their organization currently practices.

-- While levels of support for TQM initiatives vary by country in much the same way that levels of implementation do, office workers' appetite for such initiatives outstrips implementation in every country. Clearly, TQM has room to grow.

o Japan Lags Behind the U.S., Canada, and the EEC on Distributed Electronic Processing

-- The proportion of office workers who report they use distributed technology in the form of personal computers and terminals is highest in the U.S. (85%) and Canada (88%), somewhat lower in the EEC countries (80%), and much lower in Japan (64%). Correspondingly, the proportion of top executives who report they have a terminal or PC in their office is largest in the U.S. (71%), smaller in Canada (64%) and the EEC (59%), and smallest by far in Japan (30%).

- The Physical Environment and the Office Worker

  -- The proportions of office workers reporting they are the only occupant of a private office with a door are: 30% in the U.S., 24% in Canada, 22% in the EEC, and only 3% in Japan. Office workers in Canada (40%) and the U.S. (31%) are much more likely than those in the EEC (17%) or Japan (7%) to report they work in partitioned space arrangements, while Japan's office workers overwhelmingly say they share open space with others (87%, compared with 29% in the U.S., 26% in Canada, and 31% in the EEC). Facilities managers, for their part, expect no overwhelming change in office space configurations over the next five years; perhaps the most significant finding in their predictions is the anticipation of more partitioned and fewer open arrangements in Japan.

  -- Majorities of office workers ranging from 54% in the U.S. and the EEC to 58% in Canada to a high of 60% in Japan report that their "job entitles them to certain types of workspace, furniture, and accessories," with Japanese office workers more likely than those in other countries to say this is the result of a formal policy (39% in Japan, compared with 33% in Canada, 30% in the U.S., and 28% in the EEC).

  -- The findings reveal a considerable shortfall between office workers' expectations for their personal workspace and the reality they confront in the office each day. There are wide gaps between the proportion of office workers who deem the characteristic "very important" to their productivity and the proportion who say it is "very true" of their own workspace for six of the eight personal workspace features tested in the U.S., Canada, and the EEC, and on all of the features tested in Japan. Personal workspace features include proper lighting, comfortable heat and air conditioning, sufficient worksurface space, a comfortable, adjustable chair, adequate storage and file space, enough privacy and quiet, good proximity to work colleagues, and adequate meeting space in or convenient to the personal workspace.

  -- With some variations by country, substantial if moderate proportions of office workers in the U.S., Canada, the EEC, and Japan report their organization's facilities include: areas specifically set aside for training (58% in the U.S., 59% in the EEC, 49% in Japan, 44% in Canada); rooms or other areas set aside for ongoing work on specific projects (57% in the U.S., 50% in both Canada and the EEC, 42% in Japan); areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally (51% in the U.S., 52% in Canada, 53% in Japan, 42% in the EEC). However, few office workers report their facilities include areas set aside for child care (13% in Canada, 7% in the U.S., 6% in the EEC, 3% in Japan).

- Health, Safety, and Environmental Concerns Emerge

  -- Safeguarding the natural environment is a real concern for office workers today, particularly in the U.S. and Canada, but one which they believe is not getting enough attention from management. Worse still, management underestimates the extent of office workers' concern. The good news is that, with North America in the lead and Europe following, majorities of office workers report their organization currently has a program for recycling materials such as paper (67% in the U.S., 74% in Canada, and a lower 55% in the EEC). Virtually all office workers would favor such a policy.

-- Facilities managers, top executives, and designers alike expect that health and safety regulations will have a major impact on facilities design over the next five years. In the U.S., Canada, and the EEC, the proportion of office workers who say they favor each of six health policies for the workplace (substance abuse treatment programs, proactive health programs, AIDS information programs, drug testing for both prospective and current employees, and AIDS screening for prospective employees) is greater than the proportion who say their organization has implemented such a policy. However, levels of both support and reported implementation vary considerably by country, with U.S. office workers much more willing than their counterparts in Canada and the EEC to support drug testing and AIDS screening.

-- When office workers are asked to what extent they consider each of five potential hazards a serious problem at their job location, 47% in the U.S., 48% in Canada, 51% in the EEC, and a higher 62% in Japan say eyestrain is a "very" or "somewhat serious" problem; 37% in the U.S., 46% in Canada, 39% in the EEC, and 53% in Japan say air quality is a problem; 36% in the U.S., 37% in Canada, and 33% in both the EEC and Japan say potential harmful radiation from video display terminals is a problem; 33% in the U.S., 19% in Canada, 17% in the EEC, and 35% in Japan view the risk of repetitive strain injuries as a problem; and 19% in the U.S., 17% in Canada and the EEC, and 25% in Japan consider the risk of exposure to hazardous materials in the office building a "very" or "somewhat serious" problem.

o Expected Impacts on Facilities Design in the Next Five Years

-- Worldwide, telecommunications and computer needs tops a list of nine concerns or trends that facilities managers and top executives expect will have "a great deal" of impact on facilities design over the next five years or so. In general, top executives and facilities managers also expect the need to attract and retain skilled employees, space costs, and health and safety regulation and legislation to have a major impact on facilities design. Not surprisingly, executives in Japan put special emphasis on computer and telecommunications needs and space costs, while the human resources dimension seems to be a North American -- and particularly a U.S. -- concern. Further down the list, furniture and equipment costs -- and the need to utilize existing furniture in redesigns -- are more North American than European or Japanese issues.

Interior designers in the U.S., Canada, and the EEC also put technology needs firmly at the top of the list, followed by space costs -- which receives particular emphasis in Japan. The need to attract and retain skilled employees is next on the list -- with Japanese designers showing a special sensitivity here -- while furniture and equipment costs and the need to utilize existing furniture are preeminently issues in the U.S. and Canada. Japanese designers seem more likely than those in the U.S. and Canada to anticipate that health and safety legislation and regulation, an increasingly participative work environment, worker desire for privacy, and office worker involvement in the design of the work environment will be important factors in facilities design over the next five years.

o The Facilities Management and Interior Design Functions

-- The proportion of organizations reported by their top executives to have a full-time facilities management person or group is about the same in the U.S. (63%), Canada (60%), and the EEC (60%), but is somewhat lower in Japan (47%).

-- According to top executives, outside design professionals are routinely engaged in 65% of larger organizations in the U.S. and 55% in Canada, but in only 44% in Japan and 39% in the EEC. The reports of facilities managers offer roughly the same picture.

1: THE GLOBAL PERSPECTIVE

From the accounts of top executives at large organizations, U.S. organizations would appear by far to be the most parochial and insular, from an international perspective, of any under study. Canadian organizations have a considerably greater international orientation, but organizations in the European Economic Community and in Japan outpace those in either North American country (Table 1-1):

-- While the top executives in one-quarter (25%) of U.S. organizations for which the question is applicable report they face competition from foreign companies, their counterparts in over one-half (53%) of Canadian organizations, over two-thirds (67%) of Japanese organizations, and nearly three-quarters (72%) of EEC organizations say the same thing.

-- While 24% of U.S. organizations where the question is applicable participate in joint ventures with companies in other countries, the corresponding proportion in Canada is a higher 42%, in the EEC an even higher 64%, and in Japan 71% of organizations for which the question applies.

-- While 17% of U.S. organizations for which the question is applicable export products or services, according to their top executives, export activity is reported by a higher 43% in Canada and by 67% and 66%, respectively, in the EEC and Japan.

-- Only 13% of U.S. organizations for which the question applies have wholly-owned facilities in other countries; with 21% of its top executives saying the same thing, Canada's organizations are barely more likely than those in the U.S. to report direct investment abroad. Both the EEC (66%) and Japan (65%) are far ahead of the two North American nations.

To what extent are office workers themselves aware of their organization's international involvement? The rank-and-file in the U.S. seem to overstate their organizations' international involvement, while their counterparts in Japan understate this involvement. Office workers in Canada and the EEC are, on the whole, much more closely attuned to the realities of international involvement as described by top executives (Table 1-2):

-- While 49% of U.S. and 56% of Canadian office workers employed in organizations other than nonprofits and government entities report their company faces competition from foreign companies, a higher 64% of their counterparts among EEC office workers, but only 38% in Japan, say the same about their company.

-- While 47% of U.S. and 46% of Canadian office workers employed in organizations other than nonprofits and government entities report their company exports products or services, a higher 65% of their counterparts among EEC office workers, but only 36% in Japan, say the same about their company.

-- 43% of U.S., 46% of Canadian, and a similar 50% of EEC office workers in organizations to which the question applies report that their company participates in joint ventures with companies in other countries; only 29% of their counterparts in applicable organizations in Japan say the same thing.

-- While 35% of U.S. and 38% of Canadian office workers employed in organizations other than nonprofits and government entities report their company has wholly-owned facilities in other countries, a higher 48% of their counterparts among EEC office workers, but only 27% in Japan, say the same about their company.

Observation:

According to top executives -- who are the most credible source of information of this kind -- the EEC and Japan take a wide lead over both Canada and the U.S. on all four measures of international activity tested in this year's OEI -- while in North America, Canada is clearly ahead of the U.S. There is little surprising about this finding. Japan and the countries of Europe have traditionally been players in the international marketplace, while the U.S. -- with its own vast domestic market, its diverse industry mix, and its rich natural resources -- has tended towards self-sufficiency. Canada, with a much smaller economy than the U.S., has to rely upon a greater level of international involvement than its neighbor to the South.

CEO-Q.F2

Tab. [illegible]

INTERNATIONAL [illegible] TOP EXECUTIVES

(Base: Those for which question is applicable)

	Top Executives			
	U.S.	Canada	EEC	Japan
Average Base	142	94	485	94
	%	%	%	%
Organization:				
Faces competition from foreign companies	25	53	72	67
Participates in joint ventures with companies in other countries	24	42	64	71
Exports products or services	17	43	67	66
Has wholly-owned facilities in other countries	13	21	66	65

OW-Q.F8b

Table 1-2

INTERNATIONAL ACTIVITY: OFFICE WORKERS

(Base: All except those employed in not-for-profit or government organizations)

	Office Workers			
	U.S.	Canada	EEC	Japan
Base	707	181	1045	842
	%	%	%	%
Organization:				
Faces competition from foreign companies	49	56	64	38
Exports products or services	47	46	65	36
Participates in joint ventures with companies in other countries	43	46	50	29
Has wholly-owned facilities in other countries	35	38	48	27

2: HOW OFFICE WORKERS FEEL ABOUT THEIR WORK

Job Satisfaction

Office workers in North America express a higher level of job satisfaction than do their counterparts in the EEC, while the satisfaction level reported in Japan is lower still. But the vast majority of office workers the world over are at least moderately satisfied.

While 43% of U.S. and 39% of Canadian office workers say they are "very satisfied" with their job, a lower 28% in the EEC countries and only 17% in Japan are "very satisfied." Office workers in the EEC, the U.S., and Canada are about equally likely to report they are at least "somewhat satisfied" (87% in the EEC, 84% in both the U.S. and Canada), while the proportion in Japan is lower (76%). Japanese office workers are more likely than others to say they are dissatisfied with their job (24% in Japan compared with 15% in the U.S., 17% in Canada, and 12% in the EEC (Table 2-1).

Top executives, facilities managers, and interior designers everywhere underestimate the degree to which office workers are "very satisfied" with their jobs.

Linkage Between Job Performance and Personal Happiness

The sense of linkage or connection between doing one's job well and getting the things one wants most out of life is highest among office workers in the EEC, lowest in Japan, and at the same middling level in the U.S. and Canada. Fully 65% in the EEC see "a great deal" of connection, compared with 53% who say the same thing in the U.S. and Canada and only 31% in Japan. Japanese office workers are much more likely than others to say they experience "only some" connection between doing their job well and getting what they want out of life (51% in Japan, compared with 35% in the U.S., 32% in Canada, and 24% in the EEC (Table 2-2).

Top executives in the U.S., Canada, and the EEC tend to underestimate the degree to which office workers sense a linkage between their job performance and getting what they want out of life; interestingly, Japanese top executives tend to overestimate the linkage expressed by office workers.

Aspirations and Realities

The Office Environment Index for 1991 presented office workers around the world with a series of specific characteristics they might look for in a job. Office workers were asked how important each characteristic is to them, and then asked how true each characteristic is of their current job. In addition, top executives and facilities managers were asked how important and how true they believe each characteristic to be for most office workers in their organization, while interior designers were asked their opinion on how important and how true each characteristic is for most office workers in their clients' organizations.

Table 2-3 arrays the proportions of office workers and top executives who feel each characteristic is "very important," while Table 2-4 shows the proportions of each of those groups who feel each characteristic is "very true" on their current job. The findings for facilities managers and interior designers are presented in the reports which focus specifically on the U.S., Canada, and the EEC countries (these characteristics were not tested among facilities managers and interior designers in Japan). Table 2-5 shows the net difference, or "aspiration gap," between the proportion who say each characteristic is "very important" and the proportion who say it's "very true."

As the tables show, office workers' accounts of the importance and prevalence of many of these characteristics vary by country, with the proportion saying a characteristic is "very important" often much larger than the proportion saying it is "very true" of their current job:

-- Management providing the tools and resources to get the job done is more important to office workers in the U.S.(89% say this is "very important") and Canada (85%) than in the EEC (78%) or Japan (76%). This characteristic is also more often viewed as "very true" in the U.S. (51%) and Canada (46%) than in the EEC (39%) and Japan (38%). As these readings net out, however, a similar (and sizable) "gap" is shown for the U. S. (-38 percentage points), Canada (-39), the EEC (-39), and Japan (-38).

-- Being able to take pride in the quality of products and services the organization provides is more important in the U.S. (86%), Canada (82%), and Japan (79%) than in the EEC (62%). While U.S. (65%) and Canadian (62%) office workers are much more likely to find this "very true" on their job than are their counterparts in Japan (35%) and the EEC (37%). The "gap" is significant in the U.S. (-21) and Canada (-20), but slightly wider in the EEC (-25) and much wider in Japan (-44).

-- Management honesty and ethics is most important in the U.S. (85%) and Canada (87%), less important in the EEC (80%), and least important in Japan (72%). Office workers in the U.S. (40%) and Canada (36%) are more likely than those in the EEC (26%) and Japan (16%) to find this "very true" when it comes to their own management. The gap in the U.S. is the second-widest shown for any of the sixteen characteristics (-45), and is wider still in Canada (-51), the EEC (-54), and Japan (-56).

-- Having good employee benefits is most important in the U.S. (79%), less important in Japan (70%) and Canada (68%), and least important in the EEC (50%). Office workers in the U.S. (62%) and Canada (67%) are most likely to say this is "very true" of their current job, those in the EEC are less likely (36%) and those in Japan least likely (24%) to say so. A modest gap in the U.S. (-17) and the EEC (-14) narrows to almost nothing (-1) in Canada but broadens markedly in Japan (-46).

-- Clear goals and direction from top management shows a similar level of importance in the U.S. (80%), Japan (79%), and Canada (76%), and is somewhat less important in the EEC (69%). The likelihood of finding this "very true" varies only slightly by country (U.S., 29%; Canada, 32%; EEC, 24%; Japan, 27%). The gap on this characteristic is widest in the U.S. (-51) and Japan (-52), and somewhat narrower in Canada (-44) and the EEC (-45).

-- Job security is most important in the U.S. (80%) and Japan (79%), and somewhat less so in Canada (68%) and the EEC (71%). The likelihood of saying this is "very true" also does not vary dramatically by country (U.S., 56%; Canada, 48%; EEC, 56%; Japan, 50%). When netted out, the gap on job security is widest in Japan (-29), with the U.S. (-24), Canada (-20), and the EEC (-15) following after.

-- Management recognition of employee contributions is less important in the EEC (68%) than in the U.S. (78%), Canada (75%), or Japan (74%). Reported prevalence is highest among office workers in the U.S. (41%) and Canada (39%), lower in the EEC (27%), and lowest in Japan (21%). The gap is widest in Japan (-53), followed distantly by the EEC (-41), the U.S. (-37), and Canada (-36).

-- Having a challenging job is also less important in the EEC (62%) than in Japan (79%), Canada (78%), or the U.S. (77%); it is most often seen as "very true" on their current job by office workers in the U.S. (60%) and Canada (59%), less often in the EEC (44%), and least often in Japan (31%). The gap is wide in Japan (-48) but much narrower in Canada (-19), the EEC (-18), and the U.S. (-17).

-- Management recognition of the need to protect the natural environment is more important in the U.S. (74%) and Canada (72%) than in the EEC (65%), or Japan (63%). Office workers most frequently report this recognition in the U.S.(41%), followed by Canada (34%), the EEC next (27%), and Japan last (15%). While wide everywhere, the gap is wider in Japan (-48) than in Canada (-38), the EEC (-38), or the U.S. (-33).

-- The ability to contribute significantly to the organization is equally important to U.S. (72%), Canadian (70%), and Japanese (71%) office workers, with the EEC coming in quite low on this (51%). Highest reported prevalence is in the U.S. (60%) and Canada (55%), with the EEC much lower (33%) and Japan at the bottom (27%). Here the gap is much wider among Japanese office workers (-45) than among their counterparts in the U.S. (-12), Canada (-15), or the EEC (-18).

-- Management sensitivity to the need to balance job and family responsibilities is most important in Japan (74%), a little less important to office workers in the U.S. (69%) and Canada (66%), and least important to office workers in the EEC (54%). The U.S. (35%) and Canada (30%) top the list on prevalence, with Japan (21%) and the EEC (19%) trailing behind. While the gap is wide in the U.S. (-34), Canada (-36), and the EEC (-35), it is enormous in Japan (-53).

-- Encouragement of employees to participate in problem-solving is about equally important in all countries, with a slight lead for the U.S. (66%) followed by Canada (62%), Japan (61%), and the EEC (60%). Office workers in the U.S.(36%) and Canada (33%) are more likely than those in the EEC (23%) and, especially, Japan (18%) to say this is "very true" of their workplace. While the gap is widest in Japan (-43), it is on the same scale in the EEC (-37) and somewhat narrower in the U.S. (-30) and Canada (-29).

-- Good pay is most important in Japan (71%), a bit less so in the U.S. (65%) and Canada (63%), and least important in the EEC (53%). The proportion who say this is "very true" on their current job is highest in the U.S. (44%) and Canada (40%) but lower in the EEC (26%) and lowest in Japan (15%). The gap among Japanese office workers is huge (-56); it is much smaller among those in the EEC (-27) and narrowest in the U.S. (-21) and Canada (-23).

-- Having ample opportunity to move up in the organization is most important in the U.S. (56%), followed by Canada (51%), the EEC (46%), and Japan (43%). The likelihood of saying this is "very true" of their current job is highest in the U.S. (28%), a little lower in the EEC and Canada (both 25%), and lowest in Japan (19%). The gap on this characteristic, which does not vary dramatically by country, is widest in the U.S. (-28), followed by Canada (-26), Japan (-24), and the EEC (-21).

-- Management encouragement of teamwork is most important in Japan (73%), followed by Canada (59%), the EEC (53%), and the U.S. (51%). Office workers in Canada are most likely to say this is "very true" (45%), followed by those in the U.S. (37%), the EEC (28%), and Japan (23%). The gap in Japan is enormous (-50); in the EEC it is only half that size (-25), while it is significantly lower than that in the U.S. and Canada (both -14).

-- Being encouraged to take risks is seen as most important in Japan (52%), and less so in the EEC (32%), Canada (30%), and the U.S. (28%); office workers in the U.S. are only slightly more likely to consider it "very true" on their current job (21%) than are those in Canada, the EEC, and Japan (all 18%). The gap is widest in Japan (-34), narrower in the EEC (-14) and Canada (-12), and even smaller in the U.S. (-7).

Averaging the "gap" for all sixteen characteristics, it is evident that office workers in Japan (-45 points on average) show a great deal more frustration than their counterparts in the U.S. (-27), Canada (-26), or the EEC (-29).

To what extent does management understand these gaps between their office workers' aspirations and the degree to which they are fulfilled in the workplace? In the U.S., the EEC, and Japan, top executives correctly estimate -- or overestimate -- the "aspiration gaps" shown by office workers on only a handful of characteristics; in Canada, the "gap" top executives estimate for office workers is about equal to or wider than the "gap" shown for office workers themselves on over half of the sixteen characteristics (Table 2-5):

-- U.S. top executives show a good understanding of the extent to which their office workers' current jobs fall short of their aspirations on management recognition of employee contributions (the gap is -36 among top executives compared with -37 among office workers).

-- Top executives in the EEC understand their office employees' frustrations on job security (-20 vs. -15), advancement opportunity (-17 vs. -21), and job challenge (-13 vs. -18).

-- Top executives in Japan understand or even overestimate their employees' frustration on advancement opportunity (-29 vs. -24) and having a challenging job (-58 vs. -48).

-- Canadian top executives appreciate or overstate the extent to which their office workers' aspirations are met on management providing clear goals and direction (-40 vs. -44), management recognition of employee contributions (-42 vs. -36), management sensitivity to the need to balance job and family responsibilities (-38, -36), encouragement of employees to participate in problem-solving (-29 vs. -29); advancement opportunities (-21 vs. -26), job security (-24 vs. -20), good employee benefits (-3 vs. -1), job challenge (-16 vs. -19), encouragement of teamwork (-9 vs. -14), and encouragement of risk taking (-9 vs. -12).

Observation:

These findings on how office workers feel about their work suggest that despite shortcomings and problems, the U.S. and Canada have the most hospitable office environments while Japan has the dreariest -- with the twelve countries of the EEC, taken on average, somewhere in between.

Notwithstanding a Japanese cultural tendency toward understatement in survey responses, for which there is some evidence in these findings, office workers in Japan seem fundamentally less satisfied than others with their jobs and less likely to see the linkage between doing their job well and getting what they want out of life. Similarly, what may be their reticence in describing specific positive characteristics as being "very true" of their current job doesn't restrain them from attributing a high level of importance to those characteristics -- yielding "aspiration gaps" that are wider than seen in the U.S., Canada, or the EEC on key characteristics such as pay, benefits, the need to balance job and family responsibilities, and the need to protect the natural environment, the ability to make a real contribution to the organization and be recognized for it, management encouragement of employee teamwork and participation in decision-making, and pride in what the workplace produces.

It is worth noting that office workers in Japan are far less likely than their counterparts in the U.S., Canada, and the EEC to perceive their job as "managerial" (only 14% in Japan, compared with 39% in the U.S., 38% in Canada, and 31% in the EEC). Predictably, and as found elsewhere as well, Japanese managers are more likely than non-managers to express high levels of job satisfaction and "linkage" between doing their job well and getting what they want out of life, and show narrower "aspiration gaps" on a long list of specific characteristics.

Even where much remains to be done in fulfilling office workers' aspirations, management's understanding of the shortfalls is a positive sign. Top executives in Canada are closest to understanding their office workers' unmet needs, while top executives in Japan are farthest from such an understanding.

OW-Q.3a; CEO-Q.3a;
FM-Q.3a; ID-Q.3a

Table 2-1

OFFICE WORKER JOB SATISFACTION: OFFICE WORKERS, EXECUTIVES, AND INTERIOR DESIGNERS

	Office Workers				Top Executives Answering About Their Employees			
	U.S.	Canada	EEC	Japan	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000	150	100	518	100
	%	%	%	%	%	%	%	%
Very satisfied	43	39	28	17	21	22	5	9
Somewhat satisfied	41	45	59	59	67	66	80	73
Somewhat dissatisfied	12	14	10	21	12	12	14	18
Very dissatisfied	3	3	2	3	-	-	*	-

	Facilities Managers Answering About Their Employees				Interior Designers Answering About Most Office Employees		
	U.S.	Canada	EEC	Japan	U.S.	Canada	Japan
Base	150	107	507	100	150	101	100
	%	%	%	%	%	%	%
Very satisfied	26	15	6	4	7	13	13
Somewhat satisfied	65	73	71	74	73	71	61
Somewhat dissatisfied	8	11	20	14	18	11	13
Very dissatisfied	-	1	1	2	-	-	1

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*Less than 0.5%.

OW-Q.1b; CEO-Q.1b

Table 2-2

CONNECTION BETWEEN DOING JOB WELL AND GETTING WHAT YOU WANT OUT OF LIFE: OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers				Top Executives Answering About Their Employees			
	U.S.	Canada	EEC	Japan	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000	150	100	518	100
	%	%	%	%	%	%	%	%
Great deal	53	53	65	31	39	30	53	44
Only some	35	32	24	51	55	60	38	48
Hardly at all	12	14	9	16	5	7	7	7
Not sure	*	-	2	1	1	3	3	1

---

*Less than 0.5%.

OW-Q.2a, 2c;
CEO-Q.2a, 2c

Table 2-3

OFFICE CHARACTERISTICS: IMPORTANCE, OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers ("Very Important" to Them)				Top Executives ("Very Important" For their Employees)			
	U.S.	Canada	EEC	Japan	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000	150	100	518	100
	%	%	%	%	%	%	%	%
Management provides me with the tools and resources to get my job done	89	85	78	76	76	84	69	37
I'm proud of the quality of the products and services this organization provides	86	82	62	79	71	70	49	52
Management is honest, upright, and ethical in its dealing with employees and the community at large	85	87	80	72	84	88	67	49
Top management provides clear goals and direction for the organization	80	76	69	79	68	74	63	67
My job is secure from layoffs	80	68	71	79	75	85	66	44
The employee benefits -- such as insurance and vacation -- are good	79	68	50	70	81	64	38	24
Management recognizes my contributions	78	75	68	74	77	80	63	43
My job is challenging	77	78	62	79	56	58	39	67
Management recognizes and supports the need to protect the natural environment	74	72	65	63	43	52	39	30

(Continued)

OW-Q.2a, 2c;
CEO-Q.2a, 2c

Table 2-3 (Continued)

OFFICE CHARACTERISTICS: IMPORTANCE, OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers ("Very Important" to Them)				Top Executives ("Very Important" For their Employees)			
	U.S.	Canada	EEC	Japan	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000	150	100	518	100
	%	%	%	%	%	%	%	%
I can contribute significantly to my company	72	70	51	72	39	43	27	40
Management is sensitive to the need to balance job and family responsibilities	69	66	54	74	59	72	32	26
Employees at all levels are encouraged to participate in problem-solving	66	62	60	61	49	58	40	25
The pay is good	65	63	53	71	60	65	52	42
There are ample opportunities for me to move up to a better position in my company	56	51	46	43	46	49	44	40
Employees at all levels are encouraged to work in teams	51	59	53	73	36	37	36	45
I'm encouraged to take risks	28	30	32	52	16	22	21	32

OW-Q.2b, 2d;
CEO-Q.2b, 2d

Table 2-4

OFFICE CHARACTERISTICS: PREVALENCE, OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers ("Very True on Their Present Job")				Top Executives ("Very True" For Their Employees)			
	U.S.	Canada	EEC	Japan	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000	150	100	518	100
	%	%	%	%	%	%	%	%
I'm proud of the quality of the products and services this organization provides	65	62	37	35	58	56	35	26
The employee benefits -- such as insurance and vacation -- are good	62	67	36	24	79	61	34	5
I can contribute significantly to my company	60	55	33	27	45	40	20	5
My job is challenging	60	59	44	31	50	42	26	9
My job is secure from layoffs	56	48	56	50	61	61	46	47
Management provides me with the tools and resources to get my job done	51	46	39	38	53	59	48	27
The pay is good	44	40	26	15	50	50	32	7
Management recognizes my contributions	41	39	27	21	41	38	32	11
Management recognizes and supports the need to protect the natural environment	41	34	27	15	46	42	30	18
Management is honest, upright, and ethical in its dealing with employees and the community at large	40	36	26	16	63	70	44	20

(Continued)

OW-Q.2b, 2d;
CEO-Q.2b, 2d

Table 2-4 (Continued)

OFFICE CHARACTERISTICS: PREVALENCE, OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers ("Very True on Their Present Job")				Top Executives ("Very True" For Their Employees)			
	U.S.	Canada	EEC	Japan	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000	150	100	518	100
	%	%	%	%	%	%	%	%
Employees at all levels are encouraged to work in teams	37	45	28	23	30	28	26	17
Employees at all levels are encouraged to participate in problem-solving	36	33	23	18	35	29	22	14
Management is sensitive to the need to balance job and family responsibilities	35	30	19	21	36	34	15	12
Top management provides clear goals and direction for the organization	29	32	24	27	34	34	38	28
There are ample opportunities for me to move up to a better position in my company	28	25	25	19	35	28	27	11
I'm encouraged to take risks	21	18	18	18	15	13	14	15

OW-Q.2a, 3b, 2c, 2d;
CEO-Q.1a, 2b, 2c, 2d

Table 2-5

OFFICE CHARACTERISTICS: ASPIRATION GAPS, OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers				Top Executives			
	U.S.	Canada	EEC	Japan	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000	150	100	518	100
Top management provides clear goals and direction for the organization	-51	-44	-45	-52	-34	-40	-25	-39
Management is honest, upright, and ethical in its dealing with employees and the community at large	-45	-51	-54	-56	-21	-18	-23	-29
Management provides me with the tools and resources to get my job done	-38	-39	-39	-38	-23	-25	-21	-10
Management recognizes my contributions	-37	-36	-41	-53	-36	-42	-31	-32
Management is sensitive to the need to balance job and family responsibilities	-34	-36	-35	-53	-23	-38	-17	-14
Management recognizes and supports the need to protect the natural environment	-33	-38	-38	-48	+3	-10	-9	-12
Employees at all levels are encouraged to participate in problem-solving	-30	-29	-37	-43	-14	-29	-18	-11
There are ample opportunities for me to move up to a better position in my company	-28	-26	-21	-24	-11	-21	-17	-29
My job is secure from layoffs	-24	-20	-15	-29	-14	-24	-20	+3

(Continued)

OW-Q.2a, 3b, 2c, 2d;
TEO-Q.1a, 2b, 2c, 2d

Table 2-5 (Continued)

OFFICE CHARACTERISTICS: ASPIRATION GAPS, OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers				Top Executives			
	U.S.	Canada	EEC	Japan	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000	150	100	518	100
I'm proud of the quality of the products and services this organization provides	-21	-20	-25	-44	-13	-14	-14	-26
The pay is good	-21	-23	-27	-56	-10	-15	-20	-35
The employee benefits -- such as insurance and vacation -- are good	-17	-1	-14	-46	-2	-3	-4	-19
My job is challenging	-17	-19	-18	-48	-6	-16	-13	-58
Employees at all levels are encouraged to work in teams	-14	-14	-25	-50	-6	-9	-10	-28
I can contribute significantly to my company	-12	-15	-18	-45	+6	-3	-7	-35
I'm encouraged to take risks	-7	-12	-14	-34	-1	-9	-7	-17

3: HOW OFFICE WORKERS WORK

The Participative Workplace

As has been noted, substantial proportions of office workers feel it important that they be able to contribute significantly to their organization, receive recognition for that contribution, and be encouraged to participate in problem-solving. In the U.S., Canada, and the EEC, office workers show wide aspiration gaps on the latter two of these three characteristics, while office workers in Japan show wide gaps on all three.

Table 3-1 presents the results of questions asking office workers to characterize their degree of initiative on the job today and the degree of initiative they would prefer.

While one in ten or fewer office workers in the U.S. (9%), Canada (7%), and the EEC (10%) report that most of the time, in an average workweek, they're "pretty much told what to do and how to do it," the corresponding proportion of office workers in Japan is as high as 23%. Equal proportions of office workers in the U.S. (38%), Canada (37%), the EEC (37%), and Japan (37%) say they're "given a problem to solve or a goal to achieve, and ...[they] figure out what to do and how to do it." But office workers in the U.S. are most likely to say they "identify problems or goals, and get them solved or achieved" (48%), with their counterparts in Canada (41%), the EEC (36%), and Japan (34%) less likely to report they work in a "self-starting" mode. Again, Japanese office workers are more likely than others to say they prefer being told what to do and how to do it (13% in Japan, compared with 4% in the U.S., 3% in Canada, and 4% in the EEC). The preference for being given a problem to solve and figuring out what to do and how to do it is less intense in Japan than elsewhere

(29% in Japan vs. 34% in the U.S., 35% in the EEC, and 39% in Canada. However, Japanese office workers (49%) are more likely than their counterparts in the EEC (45%) and just as likely as Canadians (49%) to say they would prefer to identify problems and goals and then get them solved or achieved, while U.S. office workers are more likely than their counterparts elsewhere to prefer the "self-starting" mode (58%).

Management encouragement of employees to work in teams is much more important to office workers in Japan than elsewhere, with the "aspiration gap" on this characteristic correspondingly widest in Japan. This is interesting in light of the finding that Japanese office workers spend a greater proportion of time than those in other countries working on formal teams (28% of their time, on a mean basis), with EEC office workers the runners-up on percentage of time spent in teamwork (24%) and U.S. and Canadian office workers spending the least amount of time on teams (20% and 19%, respectively) (Table 3-2).

Total Quality Management

Perhaps the larger context for the notion of the participative workplace is the concept of "total quality management." TQM derives from the seminal work of Juran and Deming several decades ago and has traditionally been applied in industrial settings; in recent years, the TQM concept has begun to make inroads into service sector and even governmental organizations. To judge from the results of the 1991 OEI, the concept has gained a firm foothold in North America, has made some inroads in the EEC countries, but is not yet established in the Japanese office environment. While support for TQM varies by initiative as well as by country, without exception the world over those who favor each initiative outnumber those who say it is now in place in their organization (Table 3-3):

-- 80% of office workers in the U.S. and 80% in Canada, but a lower 65% in the EEC and 63% in Japan report their organization "fosters the notion of 'continuous improvement' of the work and the way things are done in the office; a higher 94% in the U.S., 93% in Canada, 91% in the EEC, and 85% in Japan would favor such an initiative.

-- 78% in the U.S., 68% in Canada, 56% in the EEC, and 48% in Japan say their organization "measures the satisfaction of...[your] office's customers or clients, either external or internal"; again, a higher 92% in the U.S., 88% in Canada, 85% in the EEC, and 73% in Japan are in favor.

-- On a lower tier of response in all countries, 67% of office workers in the U.S., 62% in Canada, and as few as 40% in the EEC and 33% in Japan report their organization has a "'do-it-right-the-first-time' philosophy for office work," while a higher 81% in the U.S., 78% in Canada, 59% in the EEC, and 54% in Japan would favor such an initiative.

-- 63% in the U.S. and 62% in Canada, but a lower 41% in the EEC and 33% in Japan say their organization measures office worker productivity; a higher 80% in the U.S., 75% in Canada, 60% in the EEC, and 49% in Japan would be in favor.

-- Offering office workers incentive compensation linked to the quality of their work is the one form of TQM which Japanese office workers (39%) are as likely as their counterparts in the U.S. (40%) -- and more likely than office workers in Canada (31%) and the EEC (32%) -- to report their organization currently practices. Many more office workers in the U.S. (82%), Canada (78%), the EEC (79%) and Japan (66%) would favor incentive compensation linked to quality of work than report their organization currently offers it.

By way of comparison, only 24% of office workers in the U.S., 27% in Canada, 24% in the EEC, and 35% in Japan report their organization offers incentive compensation linked to the quantity of their work -- which is not part of the quality management concept but one of a set of pre-TQM techniques for enhancing productivity *per se*. Although a 58% majority in the U.S. and 60% majority in Canada favor incentive compensation linked to productivity, this represents many fewer office workers than favor each of the true TQM initiatives in those countries. By contrast, in the EEC the 60% who favor this non-TQM initiative is identical to the proportion who favor productivity measurements (60%) and a "do-it-right-the-first-time" philosophy (59%). And in Japan, the proportion who say their organization currently offers incentive compensation linked to quantity is no lower than the proportions who report their organization has a "do-it-right-the-first-time" philosophy and measures office worker productivity, and only slightly lower than the proportion who say their organization currently offers its office workers incentive compensation linked to quality; what's more, the 66% majority who favor incentive compensation for quantity of work is as high as or higher than the 66% who favor incentive compensation for quality, the 54% who favor a "do-it-right-the-first-time" philosophy, and the 49% who favor productivity measurements.

The reports of top executives may give a truer reading than those of office workers on the extent to which the TQM initiatives tested have been implemented in the office workplace (Table 3-4). Directionally, these findings are not much different than those from office workers, but there are some differences worth noting. In Canada, proportionately fewer top executives than office workers report their organization measures office workers' productivity (27% vs. 62%). In the EEC, a greater proportion of top executives than office workers report implementation of the "continuous improvement" concept (83% vs. 65%), while a smaller proportion of top executives than office workers report productivity measurements (27% vs. 41%). In Japan, proportionately fewer top executives than office workers report their organization has a "do-it-right-the-first-time" philosophy (17% vs. 33%), measures customer satisfaction (34% vs. 48%), or offers incentive compensation linked to quality of work (13% vs. 39%). When it comes to the extent to which these initiatives are favored, the most striking differences between the views of top executives and office workers are seen in Japan: top executives are much more likely than office workers to support productivity measures (79% vs. 49%), but are much less likely to support incentive compensation linked to quality of work (43% vs. 66%) and the "do-it-right-the-first-time" philosophy (32% vs. 54%).

Productivity

Office workers in Canada (58%) are more likely than those in the U.S. (48%) or the EEC (48%) to feel that they and their work colleagues "certainly" do as much work as they can, while Japanese office workers are least likely to give this response (23%). Japanese office workers are more likely than others to say they "probably" do as much as they can (44% in Japan, vs. 25% in the U.S. and the EEC and 18% in Canada), but they are also more likely to say they "could probably do more" (32% vs. 26% in the U.S. and the EEC and 23% in Canada) (Table 3-5).

Top executives, facilities managers, and designers the world around underestimate the degree to which office workers feel "pushed to the wall" on productivity.

Hours Put In

On a median basis, office workers in Japan report working five more hours a week (45 hours) than their counterparts in the U.S., Canada, or the EEC (all 40 hours) (Table 3-6). About one in five office workers in the U.S. (21%) and Canada (22%) consider the hours they put in "too much," compared with a higher 31% in the EEC (despite hours that are no longer than in North America) and 33% in Japan (less surprising, considering that in Japan the work week typically runs into half of Saturday).

Again on a median basis, office workers in the U.S. and Canada estimate they spend four hours weekly in meetings (not necessarily the same as working informally with colleagues or on formal project teams). Those in the

EEC report spending only two hours, while those in Japan say they spend three hours a week in meetings (Table 3-7). One in five office workers in the U.S. (20%) and Canada (19%) feel they spend "too much" time in meetings, while a somewhat lower 14% in the EEC and 15% in Japan say the same thing.

Computer Use

From the findings, there seems little question that distributed electronic processing has made far greater inroads in North America -- and to a somewhat lesser extent in the EEC -- than in Japan.

The proportion of office workers who report they use distributed technology in the form of personal computers and terminals is highest in the U.S. (85%) and Canada (88%), somewhat lower in the EEC countries (80%), and much lower in Japan (64%) (Table 3-8). The proportion of office workers using a PC or terminal five or more hours a day may be slightly higher in the U.S. (33%) than in Canada (27%), but is lower still in the EEC (21%) and very low indeed in Japan (9%).

Correspondingly, the proportion of top executives who report they have a terminal or PC in their office is largest in the U.S. (71%), smaller in Canada (64%) and the EEC (59%), and smallest by far in Japan (only 30%) (Table 3-9).

> Observation:
>
> The revelation that Japan trails North America and Europe on office workers' job satisfaction, sense of linkage between doing their job well and getting what they want out of life, and fulfillment on key characteristics of the "participative" workplace is confirmed by a set of other findings. Office workers in Japan are much more likely than their counterparts in the U.S., Canada, or the EEC to report that they're "pretty much told what to do and how to do it." Moreover, from the reports of both office workers and top executives, Japan also lags behind the other countries in the implementation of several key elements of "total quality

management" in the office workplace. While the Japanese industrial environment may embody the principles of TQM and worker participation in decision-making, the Japanese office environment appears not to. In past years, the Office Environment Index (conducted in the U.S. and Canada only) suggested that office workers' increasing aspiration to participate in the full life of the workplace and receive recognition as individuals seemed related to the rapid proliferation of distributed technology, which in effect may have enhanced office workers' sense of participation. Notwithstanding other cultural factors which may distinguish Japan from North America and Europe, the findings show that fewer office workers in Japan use terminals or PCs -- especially for any significant portion of the workday -- than in any other country studied.

The study findings also confirm that Japanese office workers put in a significantly longer work week than their counterparts in the U.S., Canada, or the EEC countries but are the least likely to say they are doing as much as they can. This inverse correlation between hours worked and perceived productivity is revealing. While on a positive note, Japanese office workers do not feel as "pushed to the wall" as office workers in the U.S., Canada, and the EEC do, that does not make them happier than their counterparts in other countries.

On the subject of long, unproductive hours in the office, Japan shows a wider "aspiration gap" than seen in any other country on management sensitivity to the need to balance job and family life. From the findings it would seem that in Japan the issue may be less one of juggling day-care and babysitter schedules and more one of how to spend any time at home at all: Japanese office workers are much less likely than those in North America and the EEC to report children under twelve years of age in their household, but those who do have small children are much more likely than their counterparts in the other countries to have a nonworking spouse. In this sense, Japan today is a more "traditional Western" country than most Western countries.

OW-Q.16a, 16b

Table 3-1

DEGREE OF INITIATIVE: OFFICE WORKERS

	Office Workers							
	U.S.		Canada		EEC		Japan	
Base	1008		250		1449		1000	
	Best Describes	Prefer	Best Describes	Prefer	Best Describes	Prefer	Best Describes	Prefe
	%	%	%	%	%	%	%	%
You're pretty much told what to do and how to do it	9	4	7	3	10	4	23	13
You're given a problem to solve or a goal to achieve, and you figure out what to do and how to do it	38	34	37	39	37	35	37	29
You identify problems or goals, and get them solved or achieved	48	58	41	49	36	45	34	49
Combination	6	3	15	8	17	14	4	2
Not sure	*	*	-	1	*	1	2	7

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*Less than 0.5%.

OW-Q.17

Table 3-2

PROPORTION OF WORK WEEK SPENT WORKING ALONE, INFORMALLY WITH OTHERS, AND ON FORMAL TEAMS: OFFICE WORKERS

	Office Workers			
	U.S.	Canada	EEC	Japan
Base	1008	250	1444	1000
	%	%	%	%
Mean % of Time:				
Working alone	54	58	54	50
Working informally with others	26	23	22	22
Working on formal teams	20	19	24	28

OW-Q.4, 5

Table 3-3

TQM INITIATIVES: OFFICE WORKERS

	Office Workers							
	U.S.		Canada		EEC		Japan	
Base	1008		250		1449		1000	
	Does %	Favor %	Does %	Favor %	Does %	Favor %	Does %	Favor %
Foster the notion of "continuous improvement" of the work and the way things are done in the office	80	94	80	93	65	91	63	85
Measure the satisfaction of your office's customers or clients, either external or within the organization	78	92	68	88	56	85	48	73
Have a "do-it-right-the-first-time" philosophy for office work	67	81	62	78	40	59	33	54
Measure office worker productivity	63	80	62	75	41	60	33	49
Offer its office workers incentive compensation linked to the quality of their work	40	82	31	78	32	79	39	66
Offer its office workers incentive compensation linked to the quantity of their work	24	58	27	60	24	60	35	66

CEO-Q.5a, 5b

Table 3-4

TQM INITIATIVES: TOP EXECUTIVES

	Top Executives							
	U.S.		Canada		EEC		Japan	
	150		100		518		100	
Base	Organization Does	Would Favor	Organization Does	Would Favor	Organization Does	Would Favor	Organization Does	Would Favor
	%	%	%	%	%	%	%	%
Foster the notion of "continuous improvement" of the work and the way things are done in the office	86	97	87	99	83	97	72	95
Have an "do-it-right-the first time" philosophy for office work	75	91	63	85	47	72	17	32
Measure the satisfaction of your office's customers or clients, either external or within the organization	75	96	74	96	54	87	34	82
Measure office worker productivity	50	82	27	73	27	67	26	79
Offer its office workers incentive compensation linked to the quality of their work	39	83	22	72	45	82	13	43
Offer its office workers incentive compensation linked to the quantity of their work	31	63	17	50	34	64	14	32

OW-Q.3b; CEO-Q.3b;
FM-Q.4; ID-Q.3b

Table 3-5

PRODUCTIVITY: WHETHER OFFICE WORKERS DO AS MUCH AS THEY CAN: OFFICE WORKERS, EXECUTIVES, AND INTERIOR DESIGNERS

	Office Workers				Top Executives Answering About Their Employees			
	U.S.	Canada	EEC	Japan	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000	150	100	518	100
	%	%	%	%	%	%	%	%
Certainly do as much as can	48	58	48	23	33	39	16	17
Probably do as much as can	25	18	25	44	35	39	41	49
Could probably do more	26	23	26	32	32	22	43	34
Not sure	*	1	1	1	1	-	1	-

	Facilities Managers Answering About Their Employees				Interior Designers Answering About Most Office Employees		
	U.S.	Canada	EEC	Japan	U.S.	Canada	Japan
Base	150	107	507	100	150	101	100
	%	%	%	%	%	%	%
Certainly do as much as can	29	33	20	12	15	6	13
Probably do as much as can	30	39	37	46	39	35	44
Could probably do more	41	27	40	40	47	57	30
Not sure	1	1	3	2	-	2	13

---

*Less than 0.5%.

OW-Q.F4a, F4b

Table 3-6

HOURS WORKED IN TYPICAL WEEK: OFFICE WORKERS

	Office Workers			
	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000
Median hours work per week	40	40	40	45
	%	%	%	%
Consider that:				
Too much	21	22	31	33
Too little	5	5	3	4
Just right	74	71	66	61

OW-Q.F4c, F4d

Table 3-7

HOURS SPENT PER WEEK IN MEETINGS: OFFICE WORKERS

	Office Workers			
	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000
Median hours per week in meetings	4	4	2	3
	%	%	%	%
Consider that:				
Too much	20	19	14	15
Too little	10	14	13	16
Just right	69	65	63	55

OW-Q.15a, 15b

Table 3-8

USE OF TERMINALS AND PCs: OFFICE WORKERS

	Office Workers			
	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000
	%	%	%	%
Use PC/Terminal	85	88	80	64
Don't use	15	12	20	36
Use 5+ hours/day	33	27	21	9
Median hours/day	4	3	3	2

CEO-Q.F5

Table 3-9

HAVE TERMINAL OR PC IN OFFICE: TOP EXECUTIVES

	Top Executives			
	U.S.	Canada	EEC	Japan
Base	150	100	518	100
	%	%	%	%
Total PC/Terminal in Office	71	64	59	30
Have PC	23	22	21	6
Have terminal	28	21	14	12
Have both (vol.)	21	21	24	12
Don't have	29	36	39	69

4: HOW THE PHYSICAL ENVIRONMENT SUPPORTS THE OFFICE WORKER

Usual Workspace Arrangements

At first blush, it would appear from the reports of office workers that the EEC leads on private office space arrangements (51% say they work in such a space), followed distantly by the U.S. (39%) and Canada (34%), and with Japan trailing far behind with only a handful (5%) reporting they work in a private office. Depending on one's definition of "private," this may be so, but it turns out that office workers in Europe are much more likely than their counterparts in North America to describe as "a private office with a door" a workspace which they share with others rather than have all to themselves. So to look at those findings another way, the U.S. leads on office workers reporting they are the "only occupant" of "a private office with a door" (30% of all U.S. office workers), followed by Canada (24%) and the EEC (22%) at about the same level, and with Japan at the far rear with only a small handful (3%).

In either case, office workers in Canada (40%) and the U.S. (31%) are more likely than those in the EEC (17%) or Japan (7%) to report their usual workspace is a partitioned arrangement, while office workers in Japan -- unlike those anywhere else -- overwhelmingly report they work in open space arrangements (87%, compared with 29% in the U.S., 26% in Canada, and 31% in the EEC) (Table 4-1).

The European definition of "private office" could well explain why facilities managers in the EEC report such a high percentage of their organizations' office workers enjoy such an arrangement: EEC facilities managers say a mean of 53% of their office workers have a private office with a door, compared with 39% reported by facilities managers in the U.S., 34% in Canada, and only 13% in Japan (Table 4-2). Facilities managers in Canada and the U.S. report a much higher mean percentage of office workers in partitioned space (40% and 45%, respectively) than do their counterparts in the EEC (20%) or Japan (21%); smaller proportions of office workers in the U.S. (21%) and Canada (20%) than in the EEC (26%) and -- most dramatically -- Japan (67%) are now in open space. Facilities managers expect no overwhelming change in these configurations over the next five years: perhaps the most significant finding is the anticipation of more partitioned and fewer open arrangements in Japan.

Contract interior designers in the U.S. report a mean of 36% of the facilities planned by their firm in 1990 consisted of private offices with doors, 51% of partitioned space, and 13% of open space. In Canada, the corresponding mean percentages of space planned are a slightly higher 41% private space, 44% partitioned space, and 15% open space. In Japan, designers report a mean of only 9% of the facilities their firm planned in 1990 consisted of private space, 48% partitioned space, and 44% open space. For the five-year forecast, interior designers in the U.S. and Canada predict a slight downturn in private offices in favor of partitioned arrangements; interior designers in Japan anticipate a rather sharp increase in the proportion of both private offices and partitioned space in the facilities they plan, and a dramatic reduction in the proportion of open space.

Standards Programs and Choice in Workspace Detail

Majorities of office workers ranging from 54% in the U.S. and the EEC to 58% in Canada and a high of 60% in Japan report that their "job entitles them to certain types of workspace, furniture, and accessories." Japanese office workers are more likely than those in other countries to say this is a standards program set by formal policy (39% of all Japanese office workers, compared with 33% in Canada, 30% in the U.S., and 28% in the EEC) (Table 4-3). Japanese and U.S. office workers are equally likely to favor a formal standards program (78% of each are in favor), compared with a lower 73% in Canada and 65% in the EEC.

From the reports of facilities managers, it would appear that proportionately fewer large organizations in the U.S. (48%) than in Canada (62%), the EEC (70%), or Japan (80%) have formal standards programs either organization-wide or in some locations (Table 4-4). However, similar proportions of facilities managers in the U.S. (57%), Canada (55%), the EEC (56%), and Japan (52%) believe their office employees would favor a formal standards program.

Equal proportions of office workers in the U.S. (53%), Canada (52%), and the EEC (53%), but fewer in Japan (46%), report they have "some choice on details of [their] workspace, furniture, or accessories" (Table 4-5). The lower reading for Japan is reflected as well in the reports of facilities managers (Table 4-5) and interior designers (Table 4-6) on this matter.

Specific Features of the Workspace

The findings reveal a considerable shortfall between office workers' expectations for their personal workspace and the reality they confront in the office each day (Table 4-7). There are wide "gaps" between the proportion of office workers who deem the characteristic "very important" to their productivity and the proportion who say it is "very true" of their own workspace for six of the eight personal workspace features tested in the U.S., in Canada, and in the EEC, and for all of the features tested in Japan:

-- Proper lighting is given top priority worldwide, with 92% of office workers in the U.S., 90% in Canada, 81% in the EEC, and 87% in Japan deeming it "very important" to their being able to do as much as they reasonably can; a lower 64% in the U.S. (for a 28-point gap), 62% in Canada (-28 points), 50% in the EEC (-31 points), and 55% in Japan (-32 points) say this is "very true" of their own workspace.

-- 82% in the U.S., 84% in Canada, 72% in the EEC, and 85% in Japan consider comfortable heating and air conditioning where you work "very important," while a lower 44% in the U.S.(for a 38-point gap), 37% in Canada (-47 points), 37% in the EEC (-35 points), and 45% in Japan (-40 points) say this is "very true" for them.

-- Enough worksurface space to display or spread out work is of high importance to 75% of office workers in the U.S., 77% in Canada, 63% in the EEC, and 75% in Japan; a lower 46% in the U.S. (-29 points), 48% in Canada (-29 points), 40% in the EEC (-23 points), and 30% in Japan (-45 points) say this is "very true."

-- 75% in the U.S., 82% in Canada, 77% in the EEC, and 69% in Japan feel it's "very important" that their workspace have a comfortable chair that can be adjusted to your needs; 56% in the U.S. (for a 19-point gap), 60% in Canada (-22 points), 50% in the EEC (-27 points), and 27% in Japan (-42 points) say this is "very true" of their workspace.

-- 62% in the U.S., 67% in Canada, 57% in the EEC, and 72% in Japan think adequate storage and file space is "very important" to their productivity; 39% in the U.S. (for a 23-point gap), 45% in Canada (-22 points), 32% in the EEC (-25 points), and 23% in Japan (-49 points) say this is "very true."

-- Enough privacy and quiet is viewed by 60% in the U.S., 66% in Canada, 56% in the EEC, and 57% in Japan as "very important"; 30% in the U.S. (for a gap of 30 percentage points), 31% in Canada (-35 points), 25% in the EEC (-31 points), and 23% in Japan (-34 points) see this as "very true."

-- An office or work area close to people you work with on a regular basis is "very important" to 55% in the U.S., 60% in Canada, and 51% in the EEC; 56% in the U.S. (1 percentage point more than deem it "very important"), 60% in Canada (the same proportion as deem it "very important"), and 43% in the EEC (for a small gap of 8 percentage points) say this is "very true" of their own workspace.

-- Adequate meeting space in or near your office or workspace is "very important" to 54% of U.S. office workers, 58% of Canadian office workers, 45% of EEC office workers, and 69% of Japanese office workers; 50% of U.S. office workers (for a 4-point gap), 52% in Canada (-6 points), 36% in the EEC (-9 points), and 46% in Japan (-23 points) find this "very true" of their own workspace.

Facilities managers were asked how important they think the office workers in their organization would feel each of the workspace features is to their productivity and how true most of their office workers would say each of the features is in their actual situation; Table 4-8 arrays the results. From the findings, it appears that:

-- Facilities managers in the U.S. fairly accurately estimate the gap shown by office workers in the U.S. on having a comfortable chair, adequate storage and file space, an office close to people you work with, enough privacy and quiet, and adequate meeting space in or near the personal workspace; they underestimate the gap on comfortable heating and air conditioning, proper lighting, and sufficient worksurface space.

-- Facilities managers in Canada show a good understanding of the shortcomings office workers report on most items; they underestimate the gap shown among office workers on having enough privacy and quiet, and overestimate the gap on having an office or work area close to people you work with regularly.

-- Facilities managers in the EEC seem best to understand their office workers' needs and realities on having an office close to people they work with, nearby meeting space, storage space, and worksurface space; they are less in touch with office workers' expressed needs for comfortable heating and air conditioning, proper lighting, a comfortable chair, and sufficient privacy and quiet.

-- Facilities managers in Japan show a very good grasp of their office workers' viewpoint on heating and air conditioning, lighting, having a comfortable chair, storage and file space, and adequate meeting space in or near their office or workspace; they fail to comprehend the gap expressed by office workers on sufficient worksurface and enough privacy and quiet.

Interior designers in the U.S., Canada, and Japan, guessing what their clients' office employees would say, tend to show far wider gaps for most workspace features than office workers themselves report (Table 4-9).

Common Facilities

With some significant variations by country, substantial proportions of office workers in the U.S., Canada, the EEC, and Japan report their organization's facilities include:

- -- Areas specifically set aside for training; such areas are reported by nearly three in five office workers in the U.S. (58%) and the EEC (59%), but by fewer than one-half in Japan (49%) and Canada (44%).

- -- Rooms or other areas set aside for on-going work on specific projects; these are reported by nearly three in five U.S. office workers (57%), by exactly one-half of office workers in Canada and the EEC (both 50%), and by a little over two in five in Japan (42%).

- -- Areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally are reported by about one-half of office workers in the U.S. (51%), Canada (52%), and Japan (53%), but by just over two in five in the EEC (42%).

However, few office workers report their facilities include areas set aside for child care. Only in Canada do more than one in ten (13%) office workers say their facilities include areas dedicated to child care activities, compared with even lower proportions in the U.S. (7%), the EEC (6%), and Japan (3%) (Table 4-10).

Environmental Issues

Safeguarding the natural environment is a real concern for office workers today, particularly in the U.S. and Canada (where 74% and 72%, respectively, view management recognition of this need as a "very important" characteristic of the workplace) but also in the EEC (65%) and Japan (63%). But they do not believe the environment is getting enough attention from management, with "aspiration gaps" ranging from -33 percentage points in the U.S. to -38 points in Canada and the EEC and -48 points in Japan. Worse still, management grossly underestimates the extent of office workers' concern (see Tables 2-3, 2-4, and 2-5).

The good news is that, with North America in the lead and Europe following, majorities of office workers report their organization currently has a program for recycling materials such as paper (67% in the U.S., 74% in Canada, and a lower 55% majority in the EEC). Nonetheless, there is a gap between what office workers want and what has thus far been implemented, since virtually all office workers in the U.S. (97%), Canada (99%), and the EEC (95%) would favor such a policy (Table 4-11). Even higher proportions of top executives report their organization has a recycling program (82% in the U.S., 88% in Canada, and 61% in the EEC) and over nine and ten top executives (94% in the U.S., 99% in Canada, 92% in the EEC) correctly guess that most of their office employees would favor such a policy.

Health and Safety Issues

As will be seen in the next chapter of this report, substantial proportions of top executives, facilities managers, and designers expect that health and safety regulations will have a major impact on facilities design over the next five years (see Tables 5-1, 5-2, 5-3).

In the U.S., Canada, and the EEC alike, the proportion of office workers who say they favor each of six health policies for the workplace is greater than the proportion who say their organization has implemented such a policy; however, levels of both support and reported implementation vary considerably by country, with U.S. office workers much more willing than their counterparts in Canada and the EEC to support drug testing and AIDS screening (Table 4-12):

-- 56% of office workers in the U.S., compared with a lower 39% in Canada and an even lower 17% in the EEC report their organization currently has an alcohol or drug abuse treatment program. An overwhelming 91% in the U.S. and identical 90% in Canada would favor such a program, as would a smaller 74% majority in the EEC.

-- 54% of U.S. office workers say their organization has a program for promoting good health habits, compared with a lower 46% in Canada and an even lower 35% in the EEC. Again, a huge 91% in the U.S.

and similar 92% in Canada support such a program, as do 84% in the EEC.

- -- At a lower level, 38% of U.S. office workers report their organization has a program to provide employees with information about the impact of AIDS in the workplace, as do a lower 29% in Canada and still smaller 20% in the EEC. In favor of such a program are 83% of U.S. office workers, 78% of those in Canada, and a lower 67% majority in the EEC.

- -- 38% in the U.S., compared to only a handful of office workers in Canada (7%) and the EEC (6%), report their organization requires pre-employment drug testing for new hires; 71% in the U.S., compared with 45% in Canada and 40% in the EEC would support such a policy.

- -- Drug testing for current employees is reported by only 23% of U.S. office workers and an almost nonexistent 4% and 3%, respectively, in Canada and the EEC. As many as 65% would favor such a policy in the U.S., compared with 38% in Canada and 37% in the EEC.

- -- Only 11% in the U.S., 4% in Canada, and 5% in the EEC say their organization currently screens prospective employees for AIDS; 48% in the U.S., compared with only 33% in Canada and the EEC, would favor such a procedure.

Although office workers in Canada and the EEC are less supportive than those in the U.S. of drug testing and AIDS screening, top executives consistently underestimate the extent to which office employees would favor such initiatives (Table 4-13).

Hazards in the Office Workplace

Office workers were asked to what extent they consider each of five potential hazards a serious problem at their job location. Eyestrain tops the list everywhere, with 47% of office workers in the U.S., 48% in Canada, 51% in the EEC, and a higher 62% in Japan reporting it is a "very" or "somewhat serious" problem at their job location (Table 4-14). The quality of the air you breathe is considered serious by 37% in the U.S. and 39% in the EEC, and by a higher 46% in Canada and a still higher 53% in Japan. Potential harmful radiation from video display terminals is at least a "somewhat serious" problem for 36% of U.S. office workers, 37% of Canadian office workers, and a somewhat lower 33% of both EEC and Japanese office workers. Thirty-three percent (33%) in the U.S. and 35% in Japan, but a lower 19% in Canada and 17% in the EEC, consider the risk of repetitive strain injuries, such as wrist injuries, from using a computer keyboard, to be a serious problem. Finally, 19% in the U.S., 17% in both Canada and the EEC, and 25% in Japan see exposure to hazardous material in your building as at least "somewhat serious."

In the U.S., Canada, the EEC, and Japan alike, office workers who report they spend five or more hours daily at a computer terminal or personal computer are more likely than office workers on average to view eyestrain, potential harmful radiation from video display terminals, and the repetitive strain injuries as serious hazards.

Asked how much of a problem these problems are for their office workers, top executives generally tend to understate the seriousness that office workers attach to them (Table 4-15). The views of facilities managers tend to be more closely attuned to those of office workers except in Japan, where they dramatically understate the level of office worker concern (Table 4-16). Interior designers in the U.S., Canada, and Japan tend to overstate the level of concern expressed by office workers (Table 4-17).

Observation:

The findings on the physical office environment again confirm that Japan lags behind the West on the office workplace. With the overwhelming majority of its office workers in open space arrangements and a high degree of frustration expressed about specific features of the workspace, Japan's office environment seems many years out of date.

OW-Q.10, 11

Table 4-1

USUAL WORKSPACE ARRANGEMENT: OFFICE WORKERS

	Office Workers			
	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000
	%	%	%	%
Private	39	34	51	5
Share with others	9	10	29	3
Only occupant	30	24	22	3
Partitioned	31	40	17	7
Open with others	29	26	31	87
Other	*	-	1	*

---

*Less than 0.5%.

FM-Q.7a, 7b
ID-Q.6a, 6b

Table 4-2

OFFICE ARRANGEMENTS IN PLACE NOW AND FIVE YEARS FROM NOW: FACILITIES MANAGERS AND INTERIOR DESIGNERS

	Facilities Managers Mean % of Office Employees				Interior Designers: Mean % of Facilities Designed		
	U.S.	Canada	EEC	Japan	U.S.	Canada	Japan
Base	150	107	507	100	150	101	100
	%	%	%	%	%	%	%
Today/In Past Year							
Private	39	34	53	13	36	41	9
Partitioned	40	45	20	21	51	44	48
Open	21	20	26	67	13	15	44
Expected Five Years From Now							
Private	38	33	53	13	33	35	16
Partitioned	45	48	23	30	54	50	56
Open	18	19	23	60	13	15	28

OW-Q.12b, 12c, 12d

Table 4-3

STANDARDS PROGRAMS: OFFICE WORKERS

	Office Workers			
	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000
	%	%	%	%
Job entitles them to certain types of workspace, furniture, accessories	54	58	54	60
Formal policy	30	33	28	39
Just works out	23	23	22	17
Both	*	1	2	2
Favor formal program	78	73	65	78
Oppose formal program	19	20	25	11

---

*Less than 0.5%.

FM-Q.8b,8c

Table 4-4

STANDARDS PROGRAMS: FACILITIES MANAGERS

	Facilities Managers			
	U.S.	Canada	EEC	Japan
Base	150	107	507	100
	%	%	%	%
Organization has standards program	41	55	64	64
Does not have	51	37	30	20
In some locations but not others	7	7	6	16
Not sure	1	1	*	-
Think Employees:				
Favor standards program	57	55	56	52
Oppose	37	28	26	8
Not sure	7	17	18	40

---

*Less than 0.5%.

OW-Q.12a; FM-Q.8a

Table 4-5

CHOICE IN WORKSPACE DETAILS: OFFICE WORKERS AND FACILITIES MANAGERS

	Office Workers			
	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000
	%	%	%	%
Some choice	53	52	53	46
No choice	47	47	47	51
Not sure	*	1	1	3

	Facilities Managers			
	U.S.	Canada	EEC	Japan
Base	150	108	507	100
	%	%	%	%
Some choice	63	67	58	28
No choice	36	32	42	71
Not sure	1	1	-	1

---

*Less than 0.5%.

ID-Q.7a

Table 4-6

CHOICE IN WORKSPACE DETAILS: INTERIOR DESIGNERS

	Interior Designers		
	U.S.	Canada	Japan
Base	150	101	100
	%	%	%
Practically all clients allow employees some choice	21	23	14
Only some	37	52	28
Practically none	41	24	53

OW-Q.9a, 9b

Table 4-7

FEATURES OF WORKSPACE: OFFICE WORKERS

	Office Workers							
	U.S.		Canada		EEC		Japan	
Base	1008		250		1449		1000	
	Very Important	Very True	Very Important	Very True	Very Important	Very True	Very Impor tant	Very True
	%	%	%	%	%	%	%	%
Proper lighting	92	64	90	62	81	50	87	55
Comfortable heating and air conditioning where you work	82	44	84	37	72	37	85	45
Enough worksurface space to display or spread out work	75	46	77	48	63	40	75	30
A comfortable chair that can be adjusted to your needs	75	56	82	60	77	50	69	27
Adequate storage and file space	62	39	67	45	57	32	72	23
Enough privacy and quiet	60	30	66	31	56	25	57	23
An office or work area close to people you work with on a regular basis	55	56	60	60	51	43	x	x
Adequate meeting space in or near your office or workspace	54	50	58	52	45	36	69	46

FM-Q.6a, 6b

Table 4-8

FEATURES OF WORKSPACE: FACILITIES MANAGERS

	Facilities Managers							
	U.S.		Canada		EEC		Japan	
Base	150		107		507		100	
	Very Important %	Very True %	Very Important %	Very True %	Very Important %	Very True %	Very Important %	Very True %
Comfortable heating and air conditioning where you work	87	61	82	42	60	37	74	34
Proper lighting	85	80	90	62	71	47	72	45
A comfortable chair that can be adjusted to your needs	71	56	82	59	68	50	54	16
Enough worksurface space to display or spread out work	67	49	68	39	45	28	41	12
Adequate storage and file space	61	39	58	36	49	28	54	6
An office or work area close to people you work with on a regular basis	51	46	53	39	37	27	x	x
Enough privacy and quiet	50	25	54	32	39	17	20	6
Adequate meeting space in or near your office or workspace	45	38	41	39	31	24	52	24

ID-Q.5a, 5b

Table 4-9

FEATURES OF WORKSPACE: INTERIOR DESIGNERS

	Interior Designers About Their Client's Employees					
	U.S.		Canada		Japan	
Base	150		101		100	
	Very Important %	Very True For Most %	Very Important %	Very True For Most %	Very Important %	Very True For Most %
Comfortable heating and air conditioning where you work	85	39	90	36	89	42
Proper lighting	83	44	81	38	89	52
A comfortable chair that can be adjusted to your needs	76	29	81	33	81	24
Enough worksurface space to display or spread out work	74	27	73	27	81	17
Adequate storage and file space	55	29	65	26	78	14
Enough privacy and quiet	55	16	59	20	54	17
An office or work area close to people you work with on a regular basis	52	26	55	31	x	x
Adequate meeting space in or near your office or workspace	42	23	39	19	77	33

OW-Q.14

Table 4-10

COMMON FACILITIES OFFERED AT ORGANIZATIONS: OFFICE WORKERS

	Office Workers			
	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000
	%	%	%	%
Organization's Facilities Include:				
Areas specifically set aside for training	58	44	59	49
Rooms or other areas set aside for on-going work on specific projects	57	50	50	42
Areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally	51	52	42	53
Areas set aside for child care	7	13	6	3

OW-Q.8a, 8b; CEO-Q.8a, 8b

Table 4-11

RECYCLING PROGRAMS: OFFICE WORKERS AND TOP EXECUTIVES

	U.S. %	Canada %	EEC %
Office Workers			
(Base)	(1008)	(250)	(1449)
Organization has program	67	74	55
Favor	97	99	95
Top Executives			
(Base)	(150)	(100)	(518)
Organization has program	82	88	61
Most employees would favor	94	99	92

Note: Not asked in Japan.

OW-Q.8a, 8b

Table 4-12

HEALTH AND SAFETY POLICIES: OFFICE WORKERS

	Office Workers					
	U.S.		Canada		EEC	
Base	1008		250		1449	
	Does	Favor	Does	Favor	Does	Favor
	%	%	%	%	%	%
Have alcohol or drug abuse treatment program	56	91	39	90	17	74
Have a program for promoting good health habits	54	91	46	92	35	84
Provide employees with information about the impact of AIDS in the workplace	38	83	29	78	20	67
Require pre-employment drug testing for new hires	38	71	7	45	6	40
Require drug testing for current employees	23	65	4	38	3	37
Screen prospective employees for AIDS	11	48	4	33	5	33

Note: Not asked in Japan.

CEO-Q.8a, 8b

Table 4-13

HEALTH AND SAFETY POLICIES: TOP EXECUTIVES

	Top Executives					
	U.S.		Canada		EEC	
	150		100		518	
Base	Organization Does	Most Employees Would Favor	Organization Does	Most Employees Would Favor	Organization Does	Most Employees Would Favor
	%	%	%	%	%	%
Have a program for promoting good health habits	71	91	63	94	62	86
Have an alcohol or drug abuse treatment program	67	85	67	96	38	70
Provide employees with information about the impact of AIDS in the workplace	61	77	62	85	37	57
Require pre-employment drug testing for new hires	35	53	7	26	11	24
Require drug testing for current employees	23	39	5	17	6	18
Screen prospective employees for AIDS	3	39	2	26	5	20

Note: Not asked in Japan.

OW-Q.7

Table 4-14

HAZARDS IN OFFICE WORKPLACE: OFFICE WORKERS

"Very" or "Somewhat Serious"

	Office Workers			
	U.S.	Canada	EEC	Japan
Base	1008	250	1449	1000
	%	%	%	%
Eyestrain	47	48	51	62
The quality of the air you breathe	37	46	39	53
Potential harmful radiation from video display terminals	36	37	33	33
The risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard	33	19	17	35
Exposure to hazardous material in your building	19	17	17	25

CE-Q.7

Table 4-15

HAZARDS IN OFFICE WORKPLACE: TOP EXECUTIVES

"Very" or "Somewhat Serious"

	Top Executives About Their Employees			
	U.S.	Canada	EEC	Japan
Base	150	100	518	100
	%	%	%	%
Eyestrain	30	32	31	32
The risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard	28	18	11	18
The quality of the air you breathe	25	33	17	30
Potential harmful radiation from video display terminals	24	21	16	14
Exposure to hazardous material in your building	12	7	9	15

OW-Q.7

Table 4-16

HAZARDS IN OFFICE WORKPLACE: FACILITIES MANAGERS

"Very" or "Somewhat Serious"

	Facilities Managers About Their Employees			
	U.S.	Canada	EEC	Japan
Base	150	107	507	100
	%	%	%	%
Eyestrain	43	40	41	29
The quality of the air you breathe	31	47	24	30
Potential harmful radiation from video display terminals	22	29	21	18
The risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard	21	28	15	12
Exposure to hazardous material in your building	17	21	12	11

OW-Q.7

Table 4-17

HAZARDS IN OFFICE WORKPLACE: INTERIOR DESIGNERS

"Very" or "Somewhat Serious"

	Interior Designers About Their Employees		
	U.S.	Canada	Japan
Base	150	101	100
	%	%	%
Eyestrain	89	85	82
The quality of the air you breathe	84	91	65
Potential harmful radiation from video display terminals	75	57	40
The risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard	71	50	56
Exposure to hazardous material in your building	71	64	36

5: HOW THE PROFESSIONAL OFFICE ENVIRONMENT COMMUNITY RESPONDS

Issues Impacting Design

Top executives, facilities managers, and interior designers were asked how much impact they expect each of nine concerns or trends to have on facilities design in the next five years or so.

Worldwide, telecommunications and computer needs tops the list of concerns or trends that facilities managers and top executives expect will have "a great deal" of impact. In general, top executives and facilities managers also expect the need to attract and retain skilled employees, space costs, and health and safety regulation and legislation to have a major impact on facilities design. Not surprisingly, executives in Japan put special emphasis on computer and telecommunications needs and space costs, while the human resources dimension seems to be a North American -- and particularly a U.S. -- concern. Further down the list, furniture and equipment costs -- and the need to utilize existing furniture in redesigns -- are also more North American than European or Japanese issues (Tables 5-1, 5-2).

Interior designers in the U.S., Canada, and the EEC also put technology needs firmly at the top of the list, followed by space costs -- which receives particular emphasis in Japan. The need to attract and retain skilled employees is next on the list -- with Japanese designers showing a special sensitivity here -- while furniture and equipment costs and the need to utilize existing furniture are preeminently issues in the U.S. and Canada. Japanese designers seem more likely than those in the U.S. and Canada to anticipate that health and safety legislation and regulation, an increasingly participative work environment, worker desire for privacy, and office worker involvement in the design of the work environment will be important factors in facilities design over the next five years (Table 5-3).

The Facilities Management Function

The proportion of larger organizations reported by their top executives to have a full-time facilities management group or person is about the same in the U.S. (63%), Canada (60%), and the EEC (60%), but is somewhat lower in Japan (47%) (Table 5-4).

A 71-25% majority of top executives in the U.S., 57-30% in Canada, and 61-21% in the EEC view facilities design and management more as asset management than as an expense; in Japan, a 57-20% majority view facilities design and management more as an expense.

While 61% of top executives in the U.S. believe facilities plans *should* be linked to the organization's business plan "a great deal," a lower 43% feel they *are* linked to the business plan to that extent. In Canada, the comparable figures are 65% and 35%. In the EEC, a much lower 37% believe facilities plans should be linked to the business plan "a great deal," while 26% say they are; in Japan, 44% believe there should be a great deal of linkage, while 16% say their facilities plans *are* linked to their business plan "a great deal."

The Use of Outside Design Professionals

The U.S. and Canada appear to outpace the EEC and Japan in the use of outside design professionals. According to top executives, 65% of larger organizations in the U.S. and 55% in Canada, but only 44% in Japan and 39% in the EEC routinely engage such professionals (Table 5-5). Among those who report their organization does use outside design professionals, top executives in the U.S. express the highest level of satisfaction with them (51% say they have been "very satisfied, with a total of 90% at least "somewhat satisfied"), with lower satisfaction reported by top executives in Canada (35% "very satisfied," 86% at least "somewhat satisfied), the EEC (19% "very satisfied," 86% at least "somewhat satisfied"), and Japan (18% "very satisfied," 77% at least "somewhat satisfied").

Facilities managers, who may be closer to these matters, offer much the same results regarding the use of contract designers: 68% in the U.S. and 64% in Canada, but a lower 43% in Japan and 39% in the EEC say their organization routinely engages outside design professionals (Table 5-6). Among those who use outside professionals, facilities managers in Canada and the U.S. are more likely to say they are "very satisfied" with the performance of those professionals than are their counterparts in the EEC and Japan (in the U.S., 38% are "very satisfied," 87% at least "somewhat satisfied"; in Canada, 43% are "very satisfied," 99% at least "somewhat satisfied"; in the EEC, 21% are "very satisfied," with 90% at least "somewhat satisfied"; and in Japan 16% are "very satisfied," with 90% at least "somewhat satisfied"). Among those whose organizations regularly engage outside design professionals, 23% in the U.S., 18% in Canada, 21% in the EEC, and 14% in Japan report that the designers influence furniture and equipment standards "a great deal." When asked for what kinds of work they have recently engaged outside design professionals:

-- 67% of facilities managers in the U.S., 51% in Canada, 60% in the EEC, and 84% in Japan who have recently used outside design professionals report they were engaged for interior or architectural design functions (including programming and schematic design).

-- 37% in the U.S., 29% in Canada, 40% in the EEC, but only 7% in Japan report designers were retained for ongoing facilities management.

-- 12% in the U.S., 15% in Canada, 14% in the EEC, and 12% in Japan report hiring outside designers for consultation.

-- 5% in the U.S., 6% in Canada, 17% in the EEC, and 9% in Japan have hired designers for long-range planning or feasibility studies.

-- Only 2% in the U.S. report having hired contract interior designers for installation or project management, compared with a higher 13% in Canada and a much higher 29% in the EEC and 30% in Japan.

Observation:

The world over, top executives and facilities managers zero in on telecommunications and computer needs as the single most important issue in terms of its anticipated impact on facilities design in the next five years. This is particularly true in Japan, which lags behind other advanced industrial nations in the penetration of distributed processing in its office workplaces to date. Not surprisingly, space costs are a very high priority in Japan as well.

Notwithstanding some differences among the various countries of the EEC, the facilities management function appears to be more mature in the U.S., Canada, and the EEC on average than in Japan.

Similarly, retaining outside design professionals is much more likely to be reported in the U.S. and Canada than in either the EEC or Japan. Among organizations which regularly use outside designers, satisfaction with those professionals is higher in the U.S. and Canada than in the EEC and Japan. This finding may at least in part be explained by the results on how design professionals are used. While in every country interior or architectural design is cited above all as the task for which interior designers are retained, the use of outside designers for installation or project management is far more frequently reported in the EEC and Japan than in the U.S. or Canada. Thus, a significant proportion of organizations in the EEC and Japan are judging their outside designers on a set of tasks which -- unlike those described in North America -- include procurement and installation of systems, components, furniture, and equipment within a tight timeframe and budget.

FM-Q.14a

Table 5-1

ANTICIPATED IMPACT ON FACILITIES DESIGN: FACILITIES MANAGERS

"A Great Deal of Impact"

	Facilities Managers			
	U.S.	Canada	EEC	Japan
Base	150	107	507	100
	%	%	%	%
Telecommunications and computer needs	71	79	80	86
The need to attract and retain skilled employees	55	54	47	40
Space costs	49	54	45	71
Health and safety legislation and regulation	49	52	55	49
The need to utilize existing furniture rather than purchase new furniture	43	45	24	25
An increasingly participative work environment	37	43	32	37
Costs for office furniture and equipment	28	36	24	25
Office worker involvement in the design of the work environment	17	27	21	11
Worker desire for privacy	13	19	25	16

CEO-Q.16a

Table 5-2

ANTICIPATED IMPACT ON FACILITIES DESIGN: TOP EXECUTIVES

"A Great Deal of Impact"

	Top Executives			
	U.S.	Canada	EEC	Japan
Base	150	100	518	100
	%	%	%	%
Telecommunications and computer needs	71	76	71	95
The need to attract and retain skilled employees	55	42	45	49
Space costs	53	49	43	72
Health and safety legislation and regulation	49	53	40	49
The need to utilize existing furniture rather than purchase new furniture	48	43	14	12
An increasingly participative work environment	43	42	32	37
Costs for office furniture and equipment	39	36	22	20
Office worker involvement in the design of the work environment	21	26	20	21
Worker desire for privacy	18	18	18	27

ID-Q.12a

Table 5-3

ANTICIPATED IMPACT ON FACILITIES DESIGN: INTERIOR DESIGNERS

"A Great Deal of Impact"

	Interior Designers		
	U.S.	Canada	Japan
Base	150	101	100
	%	%	%
Telecommunications and computer needs	92	86	92
Space costs	77	69	82
The need to attract and retain skilled employees	63	60	72
Costs for office furniture and equipment	61	54	32
The need to utilize existing furniture rather than purchase new furniture	48	42	31
Health and safety legislation and regulation	47	40	58
An increasingly participative work environment	33	42	52
Worker desire for privacy	17	18	42
Office worker involvement in the design of the work environment	15	23	35

CEO-Q.12, 13, 14a, 14b

Table 5-4

FACILITIES MANAGEMENT: TOP EXECUTIVES

	Top Executives			
	U.S.	Canada	EEC	Japan
Base	150	100	518	100
	%	%	%	%
Have full-time facilities management	63	60	60	47
Have part-time facilities management	27	30	36	46
View Facilities Design and Management:				
More as expense	25	30	21	57
More as asset management	71	57	61	20
Facilities Plans should be Linked to Business Plan:				
A great deal	61	65	37	44
Somewhat	33	32	38	50
Not very much	3	1	13	6
Not at all	1	1	7	-
Facilities Plans are Linked To business Plan:				
A great deal	43	35	26	16
Somewhat	35	43	35	57
Not very much	18	17	23	20
Not at all	2	4	10	7

CEO-Q.15a,15b

Table 5-5

USE OF OUTSIDE DESIGN PROFESSIONALS: TOP EXECUTIVES

	Top Executives			
	U.S.	Canada	EEC	Japan
Base	150	100	518	100
	%	%	%	%
Routinely engages outside design professionals	65	55	39	44
Does not engage	34	42	59	47
(Base: Engages outside design professionals)	(97)	(55)	(199)	(44)
Satisfaction with use of outside design professionals				
Very satisfied	51	35	19	18
Somewhat satisfied	39	51	66	59
Somewhat dissatisfied	5	9	7	20
Very dissatisfied	-	-	1	-

FM-Q.13a, 13c, 13e

Table 5-6

USE OF OUTSIDE DESIGN PROFESSIONALS: FACILITIES MANAGERS

	Facilities Managers			
	U.S.	Canada	EEC	Japan
Base	150	107	507	100
	%	%	%	%
Routinely engages outside design professionals	68	64	39	43
Does not engage	32	33	61	52
(Base: Engages outside design professionals)	(102)	(68)	(213)	(43)
	%	%	%	%
Extent to which design professionals influence organization's furniture and equipment standards:				
Great deal	23	18	21	14
Somewhat	32	44	41	21
Not too much	32	24	26	37
Not at all	13	13	11	23
Satisfaction with use of outside design professionals				
Very satisfied	38	43	21	16
Somewhat satisfied	49	56	69	74
Somewhat dissatisfied	11	-	5	5
Very dissatisfied	1	-	*	-

APPENDIX A: METHODOLOGY

The Office Environment Index 1991 study was a worldwide research effort that encompassed the U.S., Canada, the twelve countries of the European Economic Community, and Japan.

U.S. and Canada Samples

-- Office Workers in the U.S.: A sample of 1,008 full-time office workers in the U.S. was screened from a national cross-section of the entire U.S. adult population 18 years of age or older (not including Alaska and Hawaii). The cross-section was developed using a modified stratified random-digit dialing method. According to the criteria by which office workers were screened from the national sample of U.S. adults, an eligible office worker was at the time of the interview employed full-time in an office with at least 25 office workers at their branch or location and had worked in any office for at least six months. If random selection yielded two or more qualified office workers residing in one household, respondent selection was determined according to which potential respondent had the most recent birthday.

-- Office Workers in Canada: A smaller sample of 250 office workers in Canada was screened according to the same criteria from a national cross-section of adults.

-- Top Executives of Larger Organizations in the U.S.: A representative sample of 150 senior-level executives with appropriate areas of responsibility (e.g., CEOs, Vice President of Human Resources or Corporate Planning) was drawn from the Dun & Bradstreet listing of organizations employing 1,500 or more persons nationwide. The universe of organizations from which executives (one per organization) were sampled includes both publicly- and privately-held corporation, nonprofit institutions, and governmental entities.

-- Top Executives of Larger Organizations in Canada: A representative sample of 100 top executives of organizations in Canada, with both executives and organizations defined as in the U.S., was drawn from the top 300 Canadian organizations by employee size, based on Dun & Bradstreet listings.

-- Facilities Managers of Large Organizations in the U.S.: A representative sample of 150 facilities managers was drawn from the same sample frame (but not necessarily from the same organizations) as Top Executives (i.e., the Dun & Bradstreet listing of organizations with 1,500 or more employees nationwide). To qualify, facilities managers were defined as persons responsible for "the management of your organization's facilities including planning, design, and construction," with three or more years' experience with those responsibilities in any organization.

-- Facilities Managers of Large Organizations in Canada: A representative sample of 107 facilities managers was drawn from the same sample frame as the sample of Top Executives in Canada, and qualified by the same criteria as facilities managers in the U.S.

-- Contract Office Designers in the U.S. and Canada: Samples of 150 contract interior designers in the U.S. and 101 in Canada were drawn from listings compiled by Steelcase Inc. Qualifying designers affirmed that they "were one of the senior people in your firm responsible for contract interior design including programming, planning, and specifying architectural finishes and office furnishings" and that they had been doing that kind of work in any firm for at least five years.

All interviews were conducted by telephone, from January through April 1991. Interviews with office workers were an average of 25 minutes in duration; those with executives and professionals an average of 20 minutes.

After completion of interviewing, questionnaires were edited, coded, key entered, and tabulated by computer. During the tabulation phase, weights were applied to the samples of office workers to adjust the results according the number of qualifying adult office workers in each household.

EEC Samples

-- Office Workers. Interviews were conducted with a total of 1,449 office workers screened from national samples of adults 18 years and over in the twelve countries of the EEC. To be eligible for the study, an office workers must have worked full-time in an office with 25 or more office workers employed at their branch or location and have worked in any office setting for at least six months. In screening office workers by these criteria, eligible adults in each contacted household were enumerated; in the event that more than one adult in the household was an eligible office worker, the one with the most recent birthday became the designated respondent. The national samples from which eligible office workers were screened were drawn through both random-digit-dialing and directory methods.

Quotas for number of completed office worker interviews were set for each of the twelve EEC countries: 250 each were slated for the UK, France, Germany (the western part) and Spain (for statistically readable bases in those important Steelcase markets), accounting for 1,000 out of the total quota of 1,500; quotas were set to divide up the remaining 500 interviews among the other eight EEC countries proportionate to the distribution of white collar workers in those eight countries as per Organization for Economic Cooperation and Development (OECD) Labor Force Indicators. When tabulating the results, a total for the EEC was created by weighting the interviews in the twelve countries to be proportionate to the distribution of white collar workers across all twelve countries. (In addition, statistical weights were applied to account for households with multiple eligibles.)

All interviews were conducted by telephone in the evening and on weekends. Interviews with office workers took an average of 25 minutes each to complete.

-- Top Executives and Facilities Managers. The samples of top executives (518) and facilities managers (507) were drawn from the same universe: the top tier by number of employees of organizations in each of the twelve EEC countries including publicly and privately held corporations, nonprofit organizations, and government entities. The top tier was defined to be the top 300 such organizations in each of the UK, France, Germany, and Spain, and the top 300 organizations in the other eight EEC countries on a combined basis. The top executive was defined as the chief executive officer of the organization or his/her designee at the strategic planning level, preferably the human resources executive. The facilities manager was defined as the executive responsible for facilities management in the organization -- management of the organization's facilities including planning, design, and construction -- or a ranking designee performing those functions. Qualifying facilities managers must have had such responsibilities in any company or organization -- not necessarily with their current employer -- for a minimum of three years.

The universe was identified on the basis of Dun & Bradstreet listings for the twelve countries into which were interfiled governmental entities not included in the D & B file. For each sample group (top executives and facilities managers), country quotas were set at 100 interviews per country in the UK, France, Germany, and Spain (for statistically readable bases in those countries), with another 100 interviews divided among the remaining eight countries proportionate to the distribution of white collar workers in those eight countries as per OECD statistics. Systematic random selection techniques were employed when drawing the samples to ensure that all organizations listed in each country had an equal probability of being selected. When tabulating the results, a total for the EEC was created by weighting the interviews in the twelve countries to be proportionate to the distribution of white collar workers across all twelve countries, as reported by the OECD.

Interviews were conducted by telephone with executives in their offices during regular office hours on weekdays. Average interview length: 20 minutes.

-- Interior Designers. Interviews with interior designers were conducted only in countries with readable samples of office workers, top executives, and facilities managers (the UK, France, Germany, and Spain). The samples of interior designers in these countries were drawn from lists of design firms provided by Steelcase Strafor.

As in other countries, only one designer could be interviewed per office, but various offices of the same firm in different geographic locations could be added to the list and treated as separate organizations.

An interior designer needed to qualify as "one of the senior people in your firm responsible for contract interior design including programming, planning, and specifying architectural finishes and office furnishings," and to have been doing "that kind of work" for at least five years in any firm.

Interviews were completed with 91 designers in the UK, 80 in France, 81 in Germany, and 84 in Spain. Interviews were conducted by telephone with designers in their offices during business hours, and took an average of 20 minutes each to complete.

Japan Samples

-- Office Workers. Interviews were conducted with 1,000 office workers screened from a national sample of adults 18 years old and over. To be eligible for the study an office workers must have worked full-time in an office with 25 or more office workers employed at their branch or location and have worked in any office setting for at least six months. In screening office workers by these criteria, eligible adults in each contacted household were enumerated; in the event that more than one adult in the household was an eligible office worker, the one with the most recent birthday became the designated respondent. The sample from which eligible office workers were screened was drawn using directory-based telephone number selection with quotas set in Sapporo, Tokyo, Nagoya, Osaka, Hiroshima and Fukuoka. Interviews were conducted by telephone from 6:00 - 10:00 pm nightly. Interviews were conducted using a questionnaire designed to take 25 minutes to administer in Japanese -- the equivalent of a 20-minute questionnaire in English.

-- Top Executives and Facilities Managers. The samples of top executives (100) and facilities managers (100) were drawn from the same universe: the top 500 publicly- and privately-held corporations, non-profit organizations and governmental entities in Japan ranked by number of employees, as identified by updated business directories. In conformity with Japanese organizational structure, top executives include department managers or board members in charge of office facilities. Facilities managers include general office managers screened for facilities management responsibilities including office layout and purchase of furniture and office systems. Qualifying facilities managers must have had such responsibilities in any organization -- not necessarily with their current employer -- for a minimum of three years.

Interviews were conducted by telephone with executives in their offices during regular office hours using a questionnaire designed to take 20 minutes to administer in Japanese -- the equivalent of a 15-minute questionnaire in English.

-- Interior Designers. Interviews were conducted with 100 contract interior designers in firms listed by Steelcase Japan. In conformity with the structure of the design community in Japan, where few professionals are engaged solely in office design, designers in listed firms who have done an office design at least once in the past year were rendered eligible. As in other countries, only one designer could be interviewed per office, but various offices of the same firm in multiple geographic locations could be added to the list and treated as separate organizations.

Qualifying interior designers must have been doing "that kind of work" for at least five years in any firm.

Interviews were conducted by telephone with designers in their offices during regular office hours, using a questionnaire designed to take 20 minutes to administer in Japanese -- the equivalent of a 15-minute questionnaire in English.

Table A-1

SAMPLES

	Office Workers	Top Executives	Facilities Managers	Contract Interior Designers	Total
U.S.	1008	150	150	150	1458
Canada	250	100	107	101	558
EEC					
U.K.	250	102	102	91	625
Germany (Western)	251	103	100	81	598
France	248	103	100	80	514
Spain	250	103	101	84	373
Other	450	107	104	-	700
Total	1449	518	507	336	2810
Japan	1000	100	100	100	1300
Total	3707	868	864	687	6126

Sampling Error

The results achieved from any sample survey are subject to sampling error. Sampling error is defined as the difference between the results obtained from the sample and those that would have been obtained had the entire population been surveyed. The size of sampling error varies both with the size of the sample and with the percentage giving a particular answer. The following table sets forth the range of error in samples of different sizes at different percentages of response:

APPROXIMATE SAMPLING TOLERANCES (AT 95% CONFIDENCE) TO
USE IN EVALUATING PERCENTAGE RESULTS APPEARING IN THIS REPORT

Number of People Asked Question on Which Survey Result Is Based	Survey Percentage Result at 10% or 90%	Survey Percentage Result at 20% or 80%	Survey Percentage Result at 30% or 70%	Survey Percentage Result at 40% or 60%	Survey Percentage Result at 50%
1,000	2	2	3	3	3
900	2	3	3	3	3
800	2	3	3	3	3
700	2	3	3	4	4
600	2	3	4	4	4
500	3	4	4	4	4
400	3	4	4	5	5
300	3	5	5	6	6
200	4	6	6	7	7
100	6	8	9	10	10
50	8	11	13	14	14

For example, if the response for a sample size of 1,000 is 30%, in 95 out of 100 identical samples drawn from the same population the response would be between 27% and 33%.

Significance of Difference Between Proportions

The difference between the percentage responses given by two independent samples to the same question may or may not be significant. To determine whether or not such a difference is indeed significant, the size of the samples involved and the percentage giving each response must be taken into account. The following table shows the margin of error that must be allowed for different sample sizes at different percentages of response:

APPROXIMATE SAMPLING TOLERANCES (AT 95% CONFIDENCE) TO USE IN EVALUATING DIFFERENCES BETWEEN TWO PERCENTAGE RESULTS APPEARING IN THIS REPORT

Approximate Sample Size of Two Groups Asked Question on Which Survey Result Is Based	Survey Percentage Result at 10% or 90%	Survey Percentage Result at 20% or 80%	Survey Percentage Result at 30% or 70%	Survey Percentage Result at 40% or 60%	Survey Percentage Result at 50%
1,000 vs. 1,000	3	4	4	4	4
800	3	4	4	5	5
500	3	4	5	5	5
300	4	5	6	6	6
200	5	6	7	7	8
100	6	8	9	10	10
50	9	11	13	14	14
800 vs. 800	3	4	4	5	5
500	3	4	5	5	6
300	4	5	6	7	7
200	5	6	7	8	8
100	6	8	10	10	10
50	9	11	13	14	14
500 vs. 500	4	4	6	6	6
300	4	6	7	7	7
200	6	7	8	8	8
100	7	9	10	11	11
50	9	12	13	14	15
300 vs. 300	5	6	7	8	8
200	5	7	8	9	9
100	7	9	10	11	11
50	9	12	14	15	15
200 vs. 200	6	8	9	10	10
100	7	10	11	12	12
50	9	12	14	15	15
100 vs. 100	8	11	13	14	14
50	10	14	16	17	17
50 vs. 50	12	16	18	19	20

For example, suppose one group of size 1,000 has a response of 34% "yes" for a question, and an independent group of size 100 has a response of 23% "yes" for the same question, for a difference of 11 percentage points. According to the table, this difference is subject to a potential sampling error of plus or minus 9 percentage points. Since the observed difference is greater than the potential sampling error, the observed difference is significant. Moreover, if the entire population were interviewed, the difference would be from 1 to 20 percentage points (the 11-point observed difference plus or minus the 9-point potential sampling error) in 95 cases out of 100.

Sampling error is only one way in which survey findings may vary from the findings that would result from interviewing every adult member of the population. Survey research is susceptible to human and mechanical errors as well, such as interviewer recording and data handling errors. However, the procedures used by the Harris firm keep errors of this kind to a minimum.

Study No. 902065

THE OFFICE ENVIRONMENT INDEX 1991:
REPORT OF FINDINGS
FOR THE U.S. AND CANADA

A Study Conducted For
Steelcase Inc.

Fieldwork: January-April 1991

Project Directors:

Merl W. Baker, President, Louis Harris and Associates (U.S.A.)
Erich Kramer, Senior Vice President
Sarah Dutton, Research Associate

Louis Harris and Associates, Inc.
630 Fifth Avenue
New York, New York 10111

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ABOUT THIS STUDY

Since 1978, Steelcase Inc. has sponsored survey research exploring the office workplace -- the Office Environment Index. This sixth edition of the OEI continues to track the views of office workers as well as those of executives and office interior designers on a wide range of workplace issues regarding both how work is done and the physical office environment. This year, the OEI focuses special attention on the family, employee health and safety, and protection of the natural environment.

This year, the OEI was a worldwide undertaking, encompassing not only North America but also the twelve countries of the European Economic Community and Japan. This report presents the findings for the U.S. and Canada.

These findings are based on interviews with:

- 1,008 full-time office workers in the U.S., and 250 in Canada, at organizations with at least 25 office employees at the branch or location where they work.
- 150 top executives of organizations in the U.S. with 1,500 or more employees nationwide, and 100 top executives of the 300 largest organizations by employee size in Canada.
- 150 facilities managers of organizations in the U.S. with 1,500 or more employees nationwide, and 107 facilities managers of the 300 largest organizations by employee size in Canada.
- 150 contract interior designers in the U.S., and 101 in Canada, selected from the leading architecture and design firms in each country.

Interviews were conducted by telephone from January through April, 1991. Interviews with office workers averaged 25 minutes in length, while those with executives and designers averaged 20 minutes.

The study was designed and conducted by Louis Harris and Associates in conjunction with Steelcase Inc., the Institute of Business Designers, and the International Facility Management Association.

Details on the study method, profiles of the samples, and a discussion of sampling tolerance levels are provided in Appendix A. In a sample of 1,000 respondents, one can say with 95% certainty that the result for a response at 50% has a statistical precision of plus or minus 3 percentage points of what it would be if the entire population were polled. Significance levels for other sample sizes and for comparisons between two sample groups can be found in Appendix A.

HIGHLIGHTS FROM THE U.S. FINDINGS

The recession has left its traces throughout these 1991 OEI findings in the form of downturned expectations and reported layoffs, and management still has some catching up to do in understanding office workers' aspirations, including their yearning to participate fully in the organization. Office workers continue to view management's leadership -- even its honesty and ethics -- with a jaundiced eye. With the "baby boomlet" continuing, child care is a pressing need that has been largely unmet by employers, and office workers' need to balance job and family life is not fully understood by management.

When it comes to the physical aspects of the office environment, management faces regulatory demands on health and safety, while office workers complain that they do not yet have the workspace features they need to be as productive as possible.

All of that notwithstanding, the U.S. office continues to push full speed ahead with distributed computer processing -- which is changing the nature of office work and of the office worker. With that sweeping change, the participatory office workplace is increasingly a reality, and the principles of total quality management have gained wide acceptance from rank-and-file and management alike. Indeed, there would seem to be no way to turn back the clock on employee empowerment and participation.

o Signs of Recession

Even as the economic news brightens, anxiety about recession is a strong undercurrent in this year's OEI:

-- The proportion of U.S. office workers who believe the quality of working life has improved over the past ten years has dropped precipitously from 55% in 1989 to 44% today. Although as always top executives, facilities managers, and interior designers are much more optimistic than office workers, fewer executives and designers this year than in 1989 believe the quality of working life has improved over the last ten years.

-- Five key job dimensions tested both this year and in the 1989 OEI study (or earlier studies) appear to have diminished in their importance to office workers since the last time a reading was taken -- a trend which may mark the impact of recession fears on the office worker psyche. These characteristics are: being able to contribute significantly to the organization, which was "very important to 77% in 1989 but to a lower 72% today; ample opportunity to move up in the organization, which was "very important" to 61% two years ago but to 56% today; good pay, which has slipped from 68% in 1989 to 65% today; management recognition of employee contributions, from 81% two years ago to 78% today; being encouraged to take risks, from 32% the last time the item was tested in 1988 to 28% today. During the same period, the perceived importance of top management providing clear goals and direction for the organization has increased from 76% to 80%.

-- Further evidence of the recessionary mindset is seen in a decrease from 61% to 56% since 1989 in the proportion of U.S. office workers who feel it's "very true" that their current job is secure from layoffs, and a drop from 32% to 28% in the proportion who feel it's "very true" that there are ample opportunities to move up in their current job.

-- Since the last time the measure was taken in 1989, there appears to have been a slight downturn in the extent to which U.S. office workers perceive a linkage between doing their job well and getting the things they most want out of life -- from 56% who saw "a great deal of connection" two years ago to 53% today -- while the proportion who say there is hardly any linkage at all is up significantly from 8% to 12%.

-- There has been a significant increase since two years ago -- from 25% to 31% -- in the number of office workers who report their organization has "eliminated a large number of managerial or other 'white collar' jobs through layoffs, early retirements, or other means" within the past year or two.

o The Participative Workplace Advances

Despite the recession, there are signs that the participative office workplace is increasingly a reality:

-- "Aspiration gaps" have diminished on two key participation characteristics: from -21 to -12 percentage points on being able to contribute significantly to the organization; and from -43 to -37 points on management recognition of employee contributions.

-- Notwithstanding the substantial gap that remains on management recognition of employee contributions (-37 points) and the wide gap seen this year on encouragement of employees to participate in problem-solving (-30 points), it is noteworthy that the gap remaining on being able to contribute significantly to the organization (-12 points) and the gaps seen on two other participation characteristics -- having a challenging job (-17 points) and management encouragement of teamwork (-14 points) are among the smallest in the findings this year.

-- Asked about the degree of initiative they take on the job today, a 48% plurality assert that they typically "identify problems or goals, and get them solved or achieved"; a smaller 38% say they're "given a problem to solve or a goal to achieve, and ...[they] figure out what to do and how to do it," while fewer than one in ten (9%) office workers report that they're "pretty much told what to do and how to do it." U.S. office workers both prefer and exercise a higher level of initiative than do office workers in Canada, the countries of the European Economic Community, or Japan.

-- However, as seen in past OEI studies, management continues to have some catching up to do in their understanding of office workers' aspirations and frustrations in a broad range of areas, including participation in the workplace. On the basis of top executives' estimates of how important and how true various specific characteristics of the workplace are to their office workers, it can be surmised that the bosses do have a fairly good understanding of office workers' unfulfilled aspirations on management recognition of employee contributions. But the findings suggest they have a significant misunderstanding on being able to contribute to the organization in the first place, encouragement of employees to participate in problem-solving, and encouragement of teamwork (as well as on several other key factors not directly related to participation).

-- Moreover, management still doesn't appreciate the degree to which office workers derive satisfaction and a sense of well-being from their jobs: while 43% of office workers are "very satisfied" with their job, only 21% of top executives would guess their organization's office workers are "very satisfied"; while 53% of office workers see "a great deal of connection" between doing their job well and getting what they most want out of life, a much smaller 39% of top executives would expect their organization's office workers to make this linkage. And the bosses still underestimate the degree to which office workers feel they are working at the peak of productivity: 48% of office workers feel they and their work colleagues "certainly do as much work as they reasonably can," compared with 33% of top executives answering about their office employees.

o Total Quality Management Has Arrived in the Office Workplace, With Room To Grow

Perhaps the larger context for the notion of the participative workplace is the concept of "total quality management." Traditionally applied in industrial settings, the TQM concept in recent years has begun to make inroads into service sector and governmental organizations. To judge from the results of the 1991 OEI, the concept has gained a firm foothold in the U.S. office environment, as measured by reports of specific initiatives undertaken:

-- Majorities of office workers report their organization "fosters the notion of 'continuous improvement' of the work and the way things are done in the office" (80%); "measures the satisfaction of your office's customers or clients, either external or within the organization" (78%); "has a 'do-it-right-the-first-time' philosophy for office work" (67%); "measures office worker productivity" (63%). A 40% minority say their organization offers its office employees incentive compensation linked to the quality of their work.

Office workers show an appetite for more TQM; a significantly higher proportion are in favor of each TQM initiative than report it is currently in place in their office:

-- 94% favor fostering the notion of "continuous improvement"; 92% measuring customer satisfaction; 81% a "do-it-right-the-first-time" philosophy; 80% productivity measurement; and 82% incentive compensation for quality work.

o Computer Use Still Climbing

-- The number of office workers who report they use distributed processing technology in the form of personal computers and terminals has risen dramatically in the past two years, from 78% in 1989 to 85% in 1991. In all, the proportion of office workers using computers has climbed 19 percentage points since 1986.

-- The proportion who say they use a computer five or more hours a day rose from 21% in 1986 to 25% in 1988 to 32% in 1989, and has stayed at about the same level (33%) in 1991.

-- The proportion of top executives who report they have a terminal or PC in their office has jumped from 57% in 1989 to a high 71% this year -- a rise of 26 percentage points since the question was first asked in 1986.

o Family Life and the Office Workplace: An Emerging Issue

Finding a way to manage the often conflicting demands of the workplace and the home has become a critical issue today, in the office workplace as much as any other. The "baby boomlet" continues apace and -- for a combination of cultural and economic reasons -- the two-breadwinner household has become more the norm than the exception.

-- A 69% majority of office workers feel that management sensitivity to the need to balance job and family responsibilities is a "very important" characteristic they look for in a job, but a much lower 35% say this is "very true" of their current job -- for a gap of 34 percentage points.

-- 34% of U.S. office workers report there are children under twelve years of age in their household. Those with young children in the household show a wider-than-average gap on management sensitivity to the need to balance job and family responsibilities and are more likely than average to feel their working hours are too long.

- -- Of those with children under twelve in the household, 9% report they are divorced, separated, or widowed; 57% are married (or living with a partner) but their spouse is employed full-time, while another 12% are married and their spouse is employed part-time. Another 6% are married and their spouse is unemployed but presumably looking for work, while finally 6% are married with their spouse not employed and not looking for work (and are presumably full-time homemakers). These findings suggest that nearly seven in ten office workers with young children in the household (or nearly one in four office workers nationally), and most likely more, need to make child care arrangements of one kind or another in order to pursue their office employment.

- -- While many in this category might not want or need child care assistance from their employer, as many as 42% of office workers with children under twelve in their household would attach the highest importance to "financial support or facilities for child care" offered by their employer. But only 15% of those with small children in the household report their employer currently offers such a benefit. In another finding, only 7% of all office workers, and 12% of facilities managers, report their office facilities have areas set aside for child care.

- -- Employers appear to be doing a better job of meeting the demand from working parents for other innovative benefits and arrangements that would be useful to them, especially for flexible benefits (which might include the ability to pay for child care with pretax dollars), and flexible hours.

o Safeguarding the Natural Environment

The natural environment emerges this year as a real concern for office workers thinking about their workplace and their job, and one which they believe is not getting enough attention from management.

- -- 74% of office workers feel it is "very important" that management recognize and support the need to protect the natural environment, but only 41% say this is "very true" of their organization -- for a wide gap of 33 percentage points. Top executives sorely underestimate office workers' concern for the natural environment, with only 43% guessing most would see it as "very important."

- -- While a 67% majority of U.S. office workers report their organization has a program for recycling materials such as paper, a virtually unanimous 97% would favor such a program. An 82% majority of top executives report their organization has a recycling program, and an even higher 94% correctly guess that most of their office employees would favor such a program.

o Health and Safety Issues

Executives and interior designers assert that health and safety regulation and legislation will be having an increasing impact on office facilities:

-- 49% of top executives, up from 44% in 1989, expect health and safety legislation and regulation will have "a great deal of impact" on facilities design in the next five years; 49% of facilities managers, up from 39% two years ago, say the same thing, as do 47% of interior designers, up from 31% in 1989.

-- This year's findings show a significant increase since 1989 (from 50% to 56%) in the number of office workers who report their organization has a substance abuse program, a decrease (from 42% to 38%) in those aware of an information program about the impact of AIDS in the workplace, and a small uptick (from 8% to 11%) in the number who report their employer screens prospective employees for AIDS. The proportion who say their employer offers a proactive health care or "wellness" program has stayed about the same, at 54%. Fully 38% report their organization requires pre-employment drug testing for new hires, while as many as 23% say their management requires drug testing for current employees.

-- For each of the health and safety policies tested, the proportion of office workers for whom it is attractive runs considerably higher than the proportion who say it has been implemented in their workplace. Overwhelming 91% majorities support substance abuse and proactive health programs; 83% favor providing employees with information about AIDS in the workplace; 71% favor drug testing for new hires; 65% favor drug testing for current employees; 48% favor AIDS testing for prospective employees.

-- U.S. office workers express considerably more concern this year than they did in 1989 about three of the four kinds of office workplace hazards tested in both years, and are somewhat more concerned about the fourth. Eyestrain tops the list of hazards, with 47% (up from 44% in 1989) considering this a "very" or "somewhat serious" problem. However, the increase in concern over the past two years is much greater for the quality of the air you breathe (37%, up from 27%) and potential harmful radiation from video display terminals (36%, up from 27%). A hazard tested for the first time this year, the risk of repetitive strain injuries, is deemed serious by 33% of U.S. office workers. Finally, concern about exposure to hazardous materials in your building is up from 12% two years ago to 19% this year. Those who use a PC or terminal five or more hours a day are considerably more likely than average to see eyestrain, repetitive strain injury, and potential harmful radiation from VDTs as serious hazards.

o Features of the Workspace

The findings reveal a considerable shortfall between office workers' expectations for their personal workspace and the reality they confront in the office each day:

-- On six of the eight features of the personal workspace tested in the 1991 OEI, there are significant gaps between the proportion of office workers who deem the characteristic "very important" to their productivity and the proportion who say it is "very true" of their own workspace. These features include proper lighting, comfortable heat and air conditioning, sufficient worksurface space to display or spread out work, a comfortable chair that can be adjusted, adequate storage and file space, and enough privacy and quiet.

-- Facilities managers show a good understanding of the shortfalls seen by office workers regarding chairs, storage space, area privacy, but underestimate the dimensions of the problem when it comes to heating and air conditioning, lighting, and sufficient worksurface space. Interior designers, guessing what their clients' office workers would experience, tend to overstate the gaps reported by office workers in the U.S. overall.

-- Office workers who report they have good lighting in their personal workspace are much less likely than those who do not to consider eyestrain a hazard. Likewise, those who say they have comfortable heating and air conditioning are much less likely than those who do not to consider air quality a hazard.

- The Facilities Management Function Comes of Age

-- From the reports of top executives, there has been an increase in the past two years in the number of U.S. organizations with a full-time facilities management staff: 63% report they have full-time facilities management today, up from 57% in 1989.

-- During the same time period, the proportion of top executives who see their facilities design and management function "more as asset management" rather than "more as an expense" has risen from 63% to 71%.

-- The proportion of top executives who say their organization's facilities plan is linked to its business plan "a great deal" is up significantly from the proportion who said that the last time the reading was taken in 1988, to 43% from 28%.

-- Facilities managers themselves are somewhat more skeptical than top executives about the status of the facilities management function in the organization: only 47% believe their bosses regard facilities management as "asset management," and only 29% assert that their organization's facilities plan is linked "a great deal" to its business plan.

- Increase in the Use of Outside Design Professionals

-- Top executives and facilities managers agree: the use of outside design professionals has been steadily increasing since 1988. Nearly two-thirds of top executives today (65%) report their organization routinely engages outside design professionals, an increase from 59% in 1989 and 44% in 1988. Among facilities managers, the reading is 68% today, up from 61% in 1989 and 38% in 1988.

-- This year, 51% of top executives who say their organization regularly engages outside design professionals are "very satisfied" with them, with an overwhelming 90% at least "somewhat satisfied." Facilities managers are somewhat more modest in their praise, but no less positive overall: 38% are "very satisfied" and 87% at least "somewhat satisfied."

CHAPTER 1: HOW OFFICE WORKERS FEEL ABOUT THEIR WORK

Signs of Recession: The Quality of Working Life Takes a Dive

The proportion of U.S. office workers who believe the quality of working life overall has improved over the past ten years has dropped precipitously since 1989, from 55% then to 44% today. This is the first significant change on the quality of working life reading since 1986, when the figure plunged dramatically to 56% from 70% in 1978 (Table 1-1). Office workers in the eastern part of the U.S. are least likely to perceive that things have improved over the past ten years and most likely to feel things have gotten worse (Table 1-2). Younger office workers are more likely to sense improvement than older ones, and -- as expected -- managers take a rosier view than nonmanagerial office employees (Table 1-3). The latter finding is confirmed in renewed evidence of the perpetual optimism of top executives, facilities managers, and interior designers, substantial majorities of whom continue to believe that the quality of working life has progressed (67% of top executives, 67% of facilities managers, 71% of interior designers). On the other hand, those majorities are somewhat smaller this year than they were in 1989 (from 78% to 67% of top executives, from 73% to 67% of facilities managers, from 77% to 71% of designers), so even with their much higher level of optimism it seems that executives and design professionals do share office workers' sense that the quality of working life has been declining (Table 1-4).

Downtick on Linkage Between Job Performance and Personal Happiness

As in 1989, the Office Environment Index suggests a slight downturn in the extent to which U.S. office workers perceive a linkage between doing their job well and getting the things they most want out of life -- from 56% who felt there was "a great deal of connection" two years ago to 53% today; the proportion who see "hardly any" connection is up from 8% to 12% (Table 1-5). Office workers in the Midwest are more likely than those in other regions to see "a great deal" of linkage, as are those in the smallest organizations (100 employees or less nationwide) (Table 1-6). Not surprisingly, managers are much more likely than nonmanagers to see "a great deal" of linkage. Office workers 30-39 years of age are less likely than those younger or older to perceive "a great deal" of linkage (Table 1-7); this has been a consistent finding in the Office Environment Index throughout the 1980s, but back in 1978 the results suggested that it was the 18-29 age group that was least likely to see the connection between doing their job well and getting what they most want out of life.

As was found in 1989, top executives seriously underestimate the degree to which office workers see the linkage (Table 1-8). However, the proportion who believe office workers would see "a great deal" of connection has increased from 31% two years ago to 39% today; it may be surmised that the bosses are getting closer to understanding office workers, their values, and their aspirations.

Job Satisfaction

With 43% of U.S. office workers reporting they are "very satisfied" with their jobs (84% in total are at least "somewhat satisfied"), job satisfaction has remained rather steady since 1978 despite a significant uptick in 1988 (Table 1-9). This year, office workers in the East show a significantly lower level of satisfaction than those in other regions (Table 1-10). As has been seen in past OEIs, those 40 and over tend to be more satisfied than those under 40 (although the level drops off somewhat among those 50 and over), and it is no surprise to find managers more satisfied than the rank-and-file (Table 1-11).

In much the same way that the bosses underestimate the degree to which office workers sense linkage between doing their jobs well and getting what they want out of life, top executives, facilities managers, and designers have consistently underestimated the level of job satisfaction that office workers themselves report (Table 1-12). While 43% of office workers say they are "very satisfied," only 21% of top executives and 26% of facilities managers would guess that most of their own employees are "very satisfied" with their jobs, while an even lower 7% of interior designers would say the same thing about most of the office employees in their clients' organizations.

Aspirations and Realities

As in previous studies, the 1991 Office Environment Index presented U.S. office workers with a series of specific characteristics they might look for in a job. Office workers were asked how important each characteristic is to them, and then asked how true each characteristic is on their current job.

In addition, top executives and facilities managers were asked how important and how true they believe each characteristic to be for most office workers in their organization, while interior designers were asked their opinion on how important and how true each characteristic is for most office workers in their clients' organizations.

Table 1-13 arrays the results.

Management providing the tools and resources to get the job done is of *paramount importance to office workers* (89% "very important"), followed closely by *pride in the quality of products and services the organization provides* (86%) and *management honesty and ethics* (85%). Two other characteristics are considered "very important" by at least four in five U.S. office workers: *clear goals and direction from top management* and *job security* (both 80%). Fewer than four in five, but at least seven in ten, view *good employee benefits* (79%), *management recognition of employee contributions* (78%), *having a challenging job* (77%), *management recognition and support of the need to protect the natural environment* (74%), and *being able to contribute significantly to the company* (72%) as "very important" job characteristics. At least three in five say the same about *management sensitivity to the need to balance job and family responsibilities* (69%), *management encouraging employees at all levels to participate in problem-solving* (66%), and *good pay* (65%); and at least one-half think that *ample opportunity to move up to a better position in the organization* (56%) and *management encouraging employees at all levels to work in teams* (51%) are "very important." Only one of the sixteen items tested -- *management encouraging employees to take risks* -- is seen as "very important" by fewer than half of U.S. office workers (28%).

U.S. office workers are significantly less likely to say each of the sixteen characteristics is "very true" of their present job than to deem it "very important." The "gap" between the "very important" and "very true" reading is highest for *top management providing clear goals and direction for the organization* (with a 51-percentage-point difference), followed by *management honesty and ethics* (-45) (Table 1-14). A second tier of "aspiration gaps" encompasses *management providing appropriate tools and resources* (-38), *management recognition of employee contributions* (-37), *management sensitivity* to the need to balance job and family responsibilities (-34), management recognition of the need to protect the natural environment (-33), and management encouragement of employees at all levels to participate in problem-solving (-30). A third tier of characteristics includes ample opportunity to move up in the organization (-28), job security (-24), pride in the organization's products or services (-21), and good pay (-21). The smallest gaps are seen on management encouragement of employees to take risks (-7), being able to contribute significantly to the organization (-12), management encouragement of employees to work in teams (-14), having a challenging job (-17), and having good employee benefits (-17). Notwithstanding substantial aspiration gaps on management recognition of employee contributions and encouragement of employees at all levels to participate in problem-solving, it is noteworthy that the gaps on three other "participation" characteristics -- having a challenging job, management encouragement of teamwork, and being able to contribute significantly to the organization (with or without recognition of those efforts!) are among the smallest seen.

Those in the 30-39 age group -- who are also least likely to perceive "a great deal" of linkage between doing their job well and getting what they want out of life -- show higher gaps than those in other age groups on six characteristics: management providing appropriate tools and resources, management recognition of employee contributions, management sensitivity to the need to balance family and job responsibilities, job security, good pay, and good employee benefits (Table 1-15). Not surprisingly, nonmanagerial office employees show higher aspiration gaps than do those who consider themselves managers on many characteristics, but express a very similar degree of frustration on management providing goals and direction, management recognition of the need to protect the natural environment, advancement opportunity, pride in the organization's products or services, being able to contribute significantly, and being encouraged to take risks.

In a trend which may mark the impact of recession fears on the office worker psyche, five key characteristics which were also measured in the 1989 OEI study (or earlier studies) appear to have diminished somewhat in their importance to office workers since the last time a reading was taken -- three of them significantly (Table 1-16):

-- The proportion who feel being able to contribute significantly to the organization is "very important" has dropped from 77% in 1989 to 72% today.

-- The "very important" reading on having ample opportunity to move up in the organization has declined from 61% in 1989 to 56% today.

-- While 68% deemed good pay "very important" two years ago, this figure has slipped 3 percentage points to 65% today.

-- The proportion who see management recognition of contributions as "very important" has gone down from 81% in 1989 to 78% today.

-- At the low end of the priorities list, being encouraged to take risks has gone down from 32% "very important" the last time the item was tested in 1988 to 28% today.

One characteristic has increased significantly in importance over the past two years:

-- 80% deem clear goals and direction from top management "very important" today, up from 76% two years ago.

Further evidence of a recessionary mindset may be seen in two characteristics that have declined in reported prevalence over the past two years:

-- The proportion of U.S. office workers who feel it's "very true" that their current job is secure from layoffs has gone down from 61% in 1989 to 56% today.

-- The proportion who believe it is "very true" that there are ample opportunities to move up on their current job has dropped from 32% to 28%.

Table 1-17 lays out the changes in aspiration gaps over the past two years. All in all, the gap has increased on:

-- Job security (from -18 to -24).

-- Top management providing clear goals and direction for the organization (from -46 to -51).

But the gap has diminished on both "participation" characteristics that pertain to employees making a contribution to the organization:

-- Being able to contribute significantly to the organization (from -21 to -12).

-- Management recognition of employee contributions (from -43 to -37).

As the findings on Tables 1-13 and 1-14 indicate, the accuracy with which top executives, facilities managers, and interior designers estimate the views of office workers on the importance and prevalence of office characteristics varies by item. As has been revealed in previous OEI studies, top management tends to underestimate the degree to which office workers' aspirations are unfulfilled. The characteristics on which the bosses seem farthest from understanding the mindset of their office employees are:

-- Management recognition and support of the need to protect the natural environment (office workers show a gap of -33, while top executives are three percentage points more likely to think their office workers would say this is "very true" than to think their office workers would deem it "very important" -- in fact, they grossly underestimate the importance of the environmental issue to their employees).

-- Management honesty and ethics (the gap among office workers is -45, while the comparable reading for top management is only -21; in this case, the bosses have read the importance of the item accurately, but overestimated the extent to which office workers would say management actually is honest and ethical).

Top executives also show a significant misunderstanding of office workers' unfulfilled aspirations on: being able to contribute to the organization, management sensitivity to the need to balance job and family responsibilities, having the ability to rise in the organization, clear goals and direction from top management, management encouragement of employees to participate in problem-solving, management providing office employees with the tools and resources to get the job done, benefits, pay, pride in the quality of the organization's products and services, job challenge, job security, and encouragement of teamwork among employees. However, top executives have a good understanding of office workers' unfulfilled aspirations on management recognition of employee contributions.

Facilities managers come much closer than top executives to gauging the dimension of office workers' unfulfilled aspirations on management providing employees with appropriate tools and resources and come somewhat closer on management recognition of the need to protect the natural environment, advancement opportunity for office employees, job security, and benefits. But they are about as far as top executives from understanding office workers on clear goals and direction from management, sensitivity to the need to balance family and job responsibilities, management encouragement of employees at all levels to participate in problem-solving, pride in the quality of products and services, good pay, having a challenging job, management encouragement of employees at all levels to work in teams, and being able to contribute significantly to the organization. Like top executives, facilities managers understand office workers' unfulfilled aspirations to be recognized for their contributions.

Interior designers are much more accurate than either top executives or facilities managers in estimating the extent of office workers' unfulfilled aspirations; in fact, as has been reported in past QEIs, they significantly overestimate the gap shown by office workers themselves on several characteristics -- particularly management recognition of employee contributions, advancement opportunities, job security, good pay, good benefits, and having a challenging job.

The Restructuring of Organizations: The "Downsizing" Trend

The recession is marked by a significant increase since two years ago -- from 25% to 31% -- in the proportion of office workers who report their organization has "eliminated a large number of managerial or other 'white collar' jobs through layoffs, early retirements, or other means" within the past year or two (Table 1-18). In contrast, there has been no increase (or decrease) in the proportion who say their organization has "reorganized, changing senior management and how the organization is run in a major way" (although with a 46% response this remains the most frequent reported mode of restructuring) or has engaged in merger and acquisition activities such as buying (22%), merging with (9%), or being bought by (6%) another organization.

Office workers in the East are most likely to report elimination of white collar jobs in their organization, and also seem most likely to report management reorganizations (Table 1-19). According to office workers' reports, the largest organizations and manufacturing companies are most likely to have cut white collar jobs significantly in the past year or two and to have reorganized; larger organizations and manufacturing companies are also most likely to have bought another company (Table 1-20).

The findings from these same questions asked of top executives would seem to confirm that the number of organizations that have experienced major white collar job elimination has risen over the past two years, while suggesting that the number of organizations which have reorganized senior management or been involved in any form of merger and acquisition activity has decreased (Table 1-21).

Observation:

> Anxiety about recession is a strong undercurrent in this year's OEI findings, with a diminishing sense of job security and advancement opportunity and increased reports of white collar layoffs. It would appear to have pulled down perceptions of the quality of working life and of the linkage between doing a job well and attaining personal happiness, and at the same time to have depressed office workers' expectations on specific job characteristics.
>
> The 30-39 age group bears watching. They show a high aspiration gap on several key job characteristics, and are also markedly less inclined than others, both younger and older, to perceive "a great deal" of linkage between doing their job well and getting what they want out of life. On that measure, there may be a generational mindset about work as well: while the 30-39 group were also least likely to express a sense of linkage between their job and their life goals in 1989, 1988, and 1986, back in 1978 it was the 18-29 group that was least inclined to see a connection. It may be that as that generation -- still part of the "baby boom" bulge -- got older, it brought its own slant on the work ethic along with it.
>
> Despite the recession, there is good news: the participatory office workplace is increasingly a reality, according to these findings, with office workers more likely than they were two years ago to assert strongly that they can contribute significantly to their organization and that management recognizes their contributions. As seen in past OEIs, management continues to have some catching up to do in their understanding of office workers' aspirations, including their employees' yearning to participate, to cooperate, to take responsibility, and to advance in the organization. And management still doesn't appreciate the degree to which office workers derive satisfaction and a sense of well-being from their jobs.

OW-Q.1a

Table 1-1

QUALITY OF WORKING LIFE COMPARED TO TEN YEARS AGO: U.S. OFFICE WORKERS TREND

	Office Workers				
	1991	1989	1988	1986	1978
Base	1008	1041	1031	1000	1047
	%	%	%	%	%
Improved	44	55	55	56	70
Gotten worse	26	17	16	18	12
Stayed the same	28	25	28	22	15
Not sure	2	3	2	4	4

W-Q.1a

Table 1-2

QUALITY OF WORKING LIFE COMPARED TO TEN YEARS AGO: U.S. OFFICE WORKERS BY REGION

	Total Office Workers	Region			
		East	South	Mid-west	West
Base	1008	330	252	255	171
	%	%	%	%	%
Improved	44	38	49	45	46
Gotten worse	26	32	21	22	26
Stayed the same	28	27	29	33	23
Not sure	2	3	1	*	5

---

*Less than 0.5%.

OW-Q.1a

Table 1-3

QUALITY OF WORKING LIFE COMPARED TO TEN YEARS AGO: U.S. OFFICE WORKERS BY AGE AND JOB LEVEL

	Total Office Workers	Age				Job Level	
		18-29	30-39	40-49	50+	Managerial	Non-Managerial
Base	1008	201	310	293	185	393	615
	%	%	%	%	%	%	%
Improved	44	49	42	46	38	52	39
Gotten worse	26	18	26	27	33	23	27
Stayed the same	28	26	30	27	28	24	31
Not sure	2	7	2	*	1	1	3

---

*Less than 0.5%.

CEO-Q.1a
FM-Q.1a; ID-Q.1a

Table 1-4

QUALITY OF WORKING LIFE COMPARED TO TEN YEARS AGO: U.S. EXECUTIVES TREND

	Top Executives				Facilities Managers				Interior Designers		
	1991	1989	1988	1986	1991	1989	1988	1986	1991	1989	1988
	150	150	150	150	150	150	150	150	150	150	150
Base	%	%	%	%	%	%	%	%	%	%	%
Improved	67	78	77	79	67	73	77	80	71	77	80
Gotten worse	12	5	5	13	12	15	5	5	14	7	7
Stayed the same	20	16	17	7	21	11	17	15	15	15	13
Not sure	1	1	1	1	-	1	1	-	1	1	1

OW-Q.1b

Table 1-5

CONNECTION BETWEEN DOING JOB WELL AND GETTING WHAT YOU WANT OUT OF LIFE: U.S. OFFICE WORKERS TREND

	Office Workers				
	1991	1989	1988	1986	1978
Base	1008	1041	1031	1000	1047
	%	%	%	%	%
Great deal	53	56	59	53	62
Only some	35	35	32	35	27
Hardly at all	12	8	8	11	9
Not sure	*	1	1	1	1

---

*Less than 0.5%.

OW-Q.1b

Table 1-6

CONNECTION BETWEEN DOING JOB WELL AND GETTING WHAT YOU WANT OUT OF LIFE: U.S. OFFICE WORKERS BY REGION AND SIZE OF ORGANIZATION

	Total Office Workers	Region				Size of Organization			
		East	South	Midwest	West	100 or Less	101-500	501-5000	Over 5000
Base	1008	330	252	255	171	121	167	253	344
	%	%	%	%	%	%	%	%	%
Great deal	53	50	51	60	53	59	52	51	54
Only some	35	38	37	29	35	31	40	39	30
Hardly at all	12	12	12	10	13	10	7	9	16
Not sure	*	*	-	*	-	-	*	-	-

---

*Less than 0.5%.

OW-Q.1b

Table 1-7

CONNECTION BETWEEN DOING JOB WELL AND GETTING WHAT YOU WANT OUT OF LIFE: U.S. OFFICE WORKERS BY AGE AND JOB LEVEL

	Total Office Workers	Age				Job Level	
		18-29	30-39	40-49	50+	Managerial	Non-Managerial
Base	1008	201	310	293	185	393	615
	%	%	%	%	%	%	%
Great deal	53	58	45	54	59	61	48
Only some	35	35	40	34	29	31	37
Hardly at all	12	8	14	12	12	7	15
Not sure	*	-	*	-	*	-	*

---

*Less than 0.5%.

CEO-Q.1b

Table 1-8

CONNECTION BETWEEN DOING JOB WELL AND GETTING WHAT YOU WANT OUT OF LIFE: U.S. EXECUTIVES TREND

	Top Executives Answering About Their Employees	
	1991	1989
	150	150
	%	%
Great deal	39	31
Only some	55	64
Hardly at all	5	5
Not sure	1	-

OW-Q.3a

Table 1-9

JOB SATISFACTION: U.S. OFFICE WORKERS TREND

	Office Workers				
	1991	1989	1988	1986	1978
Base	1008	1041	1031	1000	1047
	%	%	%	%	%
Very satisfied	43	41	46	42	42
Somewhat satisfied	41	42	41	42	40
Somewhat dissatisfied	12	13	11	13	13
Very dissatisfied	3	3	2	3	4

OW-Q.3a

Table 1-10

JOB SATISFACTION: U.S. OFFICE WORKERS BY REGION

	Total Office Workers	Region			
		East	South	Mid-west	West
Base	1008	330	252	255	171
	%	%	%	%	%
Very satisfied	43	37	47	47	46
Somewhat satisfied	41	45	37	40	40
Somewhat dissatisfied	12	14	12	11	10
Very dissatisfied	3	3	3	2	4

OW-Q.3a

Table 1-11

JOB SATISFACTION: U.S. OFFICE WORKERS BY AGE AND JOB LEVEL

	Total Office Workers	Age				Job Level	
		18-29	30-39	40-49	50+	Managerial	Non-Managerial
Base	1008	201	310	293	185	393	615
	%	%	%	%	%	%	%
Very satisfied	43	38	36	53	47	48	41
Somewhat satisfied	41	45	47	34	38	40	42
Somewhat dissatisfied	12	14	13	11	9	9	14
Very dissatisfied	3	2	3	2	5	2	3

CEO-Q.3a
FM-Q.3a; ID-Q.3a

Table 1-12

OFFICE WORKERS JOB SATISFACTION:
U.S. EXECUTIVES TREND

	Top Executives Answering About Their Employees				Facilities Managers Answering About Their Employees				Interior Designers Answering About Most Office Employees		
	1991	1989	1988	1986	1991	1989	1988	1986	1991	1989	1988
	150	150	150	150	150	150	150	150	150	150	150
Base	%	%	%	%	%	%	%	%	%	%	%
Very satisfied	21	21	19	21	26	21	23	17	7	3	1
Somewhat satisfied	67	69	75	69	65	64	69	71	73	75	69
Somewhat dissatisfied	12	9	5	9	8	15	7	11	18	20	29
Very dissatisfied	-	-	-	1	-	1	1	-	-	-	-

OW-Q.2a, 2b, 2c, 2d; CEO-Q.2a, 2b, 2c, 2d
FM-Q.2a, 2b, 2c, 2d; ID-Q.2a, 2b, 2c, 2d

Table 1-13

OFFICE CHARACTERISTICS: IMPORTANCE AND PREVALENCE: U.S. OFFICE WORKERS AND EXECUTIVES

	Office Workers		Top Executives		Facilities Managers		Interior Designers	
Base	1008		150		150		150	
	Very Important to Them	Very True on Their Present Job	Very Important For Their Employees	Very True For Their Employees	Very Important For Their Employees	Very True For Their Employees	Very Important For Most Office Workers	Very True For Most Office Workers
	%	%	%	%	%	%	%	%
Management provides me with the tools and resources to get my job done	89	51	76	53	83	47	74	33
I'm proud of the quality of the products and services this organization provides	86	65	71	58	71	57	61	32
Management is honest, upright, and ethical in its dealing with employees and the community at large	85	40	84	63	83	58	74	27
Top management provides clear goals and direction for the organization	80	29	68	34	75	39	73	17
My job is secure from layoffs	80	56	75	61	87	61	82	29

(Continued)

OW-Q.2a, 2b, 2c, 2d; CEO-Q.2a, 2b, 2c, 2d
FM-Q.2a, 2b, 2c, 2d; ID-Q.2a, 2b, 2c, 2d

Table 1-13 (Continued)

OFFICE CHARACTERISTICS: IMPORTANCE AND PREVALENCE: U.S. OFFICE WORKERS AND EXECUTIVES

	Office Workers		Top Executives		Facilities Managers		Interior Designers	
Base	1008		150		150		150	
	Very Important to Them	Very True on Their Present Job	Very Important For Their Employees	Very True For Their Employees	Very Important For Their Employees	Very True For Their Employees	Very Important For Most Office Workers	Very True For Most Office Workers
	%	%	%	%	%	%	%	%
The employee benefits -- such as insurance and vacation -- are good	79	62	81	79	90	79	74	35
Management recognizes my contributions	78	41	77	41	77	42	74	23
My job is challenging	77	60	56	50	47	42	56	26
Management recognizes and supports the need to protect the natural environment	74	41	43	46	60	49	46	17
I can contribute significantly to my company	72	60	39	45	41	43	47	29
Management is sensitive to the need to balance job and family responsibilities	69	35	59	36	60	40	55	15

(Continued)

OW-Q.2a, 2b, 2c, 2d; CEO-Q.2a, 2b, 2c, 2d
FM-Q.2a, 2b, 2c, 2d; ID-Q.2a, 2b, 2c, 2d

Table 1-13 (Continued)

OFFICE CHARACTERISTICS: IMPORTANCE AND PREVALENCE: U.S. OFFICE WORKERS AND EXECUTIVES

	Office Workers		Top Executives		Facilities Managers		Interior Designers	
Base	1008		150		150		150	
	Very Important to Them	Very True on Their Present Job	Very Important For Their Employees	Very True For Their Employees	Very Important For Their Employees	Very True For Their Employees	Very Important For Most Office Workers	Very True For Most Office Workers
	%	%	%	%	%	%	%	%
Employees at all levels are encouraged to participate in problem-solving	66	36	49	35	47	35	46	21
The pay is good	65	44	60	50	55	41	66	25
There are ample opportunities for me to move up to a better position in my company	56	28	46	35	56	35	67	26
Employees at all levels are encouraged to work in teams	51	37	36	30	39	31	37	25
I'm encouraged to take risks	28	21	16	15	14	17	13	8

OW-Q.2a, 3b, 2c, 2d;
CEO-Q.1a, 2b, 2c, 2d

Table 1-14

OFFICE CHARACTERISTICS: ASPIRATION GAPS,
U.S. OFFICE WORKERS AND EXECUTIVES

	Office Workers	Top Executives	Facilities Managers	Interior Designers
Base	1008	150	150	150
Top management provides clear goals and direction for the organization	-51	-34	-36	-56
Management is honest, upright, and ethical in its dealing with employees and the community at large	-45	-21	-25	-47
Management provides me with the tools and resources to get my job done	-38	-23	-36	-41
Management recognizes my contributions	-37	-36	-35	-51
Management is sensitive to the need to balance job and family responsibilities	-34	-23	-20	-40
Management recognizes and supports the need to protect the natural environment	-33	+3	-11	-29
Employees at all levels are encouraged to participate in problem-solving	-30	-14	-12	-25
There are ample opportunities for me to move up to a better position in my company	-28	-11	-21	-41
My job is secure from layoffs	-24	-14	-26	-53

(Continued)

OW-Q.2a, 3b, 2c, 2d;
CEO-Q.1a, 2b, 2c, 2d

Table 1-14 (Continued)

OFFICE CHARACTERISTICS: ASPIRATION GAPS, U.S. OFFICE WORKERS AND EXECUTIVES

	Office Workers	Top Executives	Facilities Managers	Interior Designers
Base	1008	150	150	150
I'm proud of the quality of the products and services this organization provides	-21	-13	-14	-29
The pay is good	-21	-10	-14	-41
The employee benefits -- such as insurance and vacation -- are good	-17	-2	-11	-39
My job is challenging	-17	-6	-5	-30
Employees at all levels are encouraged to work in teams	-14	-6	-8	-12
I can contribute significantly to my company	-12	+6	+2	-18
I'm encouraged to take risks	-7	-1	+3	-5

OW-Q.2a, 3b, 2c, 2d;
CEO-Q.1a, 2b, 2c, 2d

Table 1-15

OFFICE CHARACTERISTICS: ASPIRATION GAPS, U.S. OFFICE WORKERS BY AGE AND JOB LEVEL

		Age				Job Level	
	Total	18-29	30-39	40-49	50+	Managerial	Non-Managerial
Top management provides clear goals and direction for the organization	-51	-42	-54	-55	-48	-53	-49
Management is honest, upright, and ethical in its dealing with employees and the community at large	-45	-43	-47	-47	-42	-41	-48
Management provides me with the tools and resources to get my job done	-38	-33	-43	-30	-33	-30	-37
Management recognizes my contributions	-37	-40	-46	-28	-33	-34	-39
Management is sensitive to the need to balance job and family responsibilities	-34	-33	-41	-33	-29	-29	-37
Management recognizes and supports the need to protect the natural environment	-33	-35	-34	-33	-26	-32	-34
Employees at all levels are encouraged to participate in problem-solving	-30	-30	-35	-28	-30	-26	-33
There are ample opportunities for me to move up to a better position in my company	-28	-35	-30	-22	-25	-25	-29
My job is secure from layoffs	-24	-15	-30	-24	-23	-19	-27

(Continued)

OW-Q.2a, 3b, 2c, 2d;
CEO-Q.1a, 2b, 2c, 2d

Table 1-15 (Continued)

OFFICE CHARACTERISTICS: ASPIRATION GAPS, U.S. OFFICE WORKERS BY AGE AND JOB LEVEL

		Age				Job Level	
	Total	18-29	30-39	40-49	50+	Managerial	Non-Managerial
I'm proud of the quality of the products and services this organization provides	-21	-20	-25	-23	-14	-22	-21
The pay is good	-21	-22	-30	-19	-14	-12	-27
The employee benefits -- such as insurance and vacation -- are good	-17	-16	-23	-15	-16	-9	-23
My job is challenging	-17	-24	-22	-7	-18	-12	-21
Employees at all levels are encouraged to work in teams	-14	-13	-18	-13	-15	-9	-18
I can contribute significantly to my company	-12	-9	-14	-9	-15	-10	-13
I'm encouraged to take risks	-7	-2	-7	-13	-4	-6	-7

OW-Q.2a, 2b, 2c, 2d

Table 1-16

IMPORTANCE AND PREVALENCE OF OFFICE CHARACTERISTICS: U.S. OFFICE WORKERS TREND

	Very Important					Very True				
	1991	1989	1988	1986	1978	1991	1989	1988	1986	1978
Base: 1991, 1008; 1989, 1041; 1988, 1031; 1986, 1000; 1978, 1047.	%	%	%	%	%	%	%	%	%	%
I'm proud of the quality of products and services this organization provides	86	NA	85	NA	NA	65	NA	65	NA	NA
Management is honest, upright, ethical	85	87	89	NA	NA	40	39	41	NA	NA
The employee benefits are good	79	77	81	80	64	62	61	65	61	63
Top management provides clear goals and directions for the organization	80	76	NA	NA	NA	29	30	NA	NA	NA
My job is secure from layoffs	80	79	82	NA	NA	56	61	63	NA	NA
Management recognizes my contributions	78	81	NA	NA	NA	41	38	NA	NA	NA
My job is challenging	77	79	81	82	75	60	61	63	59	60
I can contribute significantly to my company	72	77	76	74	79	60	56	56	54	69
The pay is good	65	68	68	74	65	44	44	42	42	41
There are ample opportunities for me to move to a better position in my company	56	61	65	66	66	28	32	35	32	28
I'm encouraged to take risks	28	NA	32	31	NA	21	NA	21	20	NA

Table 1-17

OFFICE CHARACTERISTICS ASPIRATION GAPS:
U.S. OFFICE WORKERS TREND

-- Percentage Points --

	Office Workers				
	1991	1989	1988	1986	1978
Top management provides clear goals and direction for the organization	-51	-46	NA	NA	NA
Management is honest, upright, and ethical in its dealings with employees and the community at large	-45	-48	-48	NA	NA
Management recognizes my contributions	-37	-43	NA	NA	NA
There are ample opportunities for me to move up to a better position in my company	-28	-29	-30	-34	-38
My job is secure from layoffs	-24	-18	-19	NA	NA
The pay is good	-21	-24	-26	-32	-24
I'm proud of the quality of the products and services this organization provides	-21	NA	-20	NA	NA
The employee benefits -- such as insurance and vacation -- are good	-17	-16	-16	-19	-1
My job is challenging	-17	-18	-18	-23	-15
I can contribute significantly to my company	-12	-21	-20	-20	-10
I'm encouraged to take risks	-7	NA	-11	-11	NA

OW-Q.3c

Table 1-18

RESTRUCTURING: U.S. OFFICE WORKERS TREND

	Office Workers	
	1991	1989
Base	1008	1041
	%	%
Within Past Year or Two, Organization Has:		
Reorganized, changing senior management and how the organization is run in a major way	46	46
Eliminated a large number of managerial or other "white collar" jobs through layoffs, early retirements, or other means	31	25
Bought another company	22	22
Merged with another company to form a new company	9	8
Been bought by another company	6	9

OW-Q.3c

Table 1-19

RESTRUCTURING: U.S. OFFICE WORKERS BY REGION

		Region			
	Total	East	South	Mid-west	West
Base	1008	330	252	255	171
	%	%	%	%	%
Within Past Year or Two, Organization Has:					
Reorganized, changing senior management and how the organization is run in a major way	46	51	43	44	46
Eliminated a large number of managerial or other "white collar" jobs through layoffs, early retirements, or other means	31	39	26	27	29
Bought another company	22	23	16	25	26
Merged with another company to form a new company	9	10	11	7	8
Been bought by another company	6	6	6	7	7

OW-Q.3c

Table 1-20

RESTRUCTURING: U.S. OFFICE WORKERS BY SIZE AND TYPE OF ORGANIZATION

		Size of Organization				Type of Organization			
	Total	100 or Less	101-500	501-5000	Over 5000	Manufacturing	Service	Non-Profit	Government
Base	1008	121	167	253	344	207	487	87	214
	%	%	%	%	%	%	%	%	%
Within Past Year or Two, Organization Has:									
Reorganized, changing senior management and how the organization is run in a major way	46	37	39	48	54	57	46	41	40
Eliminated a large number of managerial or other "white collar" jobs through layoffs, early retirements, or other means	31	15	17	34	43	46	31	15	25
Bought another company	22	9	17	28	29	35	28	5	3
Merged with another company to form a new company	9	5	6	12	11	11	11	8	2
Been bought by another company	6	3	8	7	7	9	9	2	*

---

*Less than 0.5%.

OW-Q.3c; CEO-Q.4a

Table 1-21

RESTRUCTURING: U.S. TOP EXECUTIVES TREND

	Top Executives	
	1991	1989
Base	150	150
	%	%
Within Past Year or Two, Organization Has:		
Reorganized, changing senior management and how the organization is run in a major way	47	51
Eliminated a large number of managerial or other "white collar" jobs through layoffs, early retirements, or other means	27	24
Bought another company	23	31
Merged with another company to form a new company	3	7
Been bought by another company	1	8

2: HOW OFFICE WORKERS WORK

The Participative Workplace

As described in the previous chapter, office workers report some progress toward a participative office work environment, with "aspiration gaps" narrowing on specific characteristics such as being able to make a significant contribution to the organization, and receiving recognition for that contribution -- although the current gaps on recognition (-37) and on participation in problem-solving (-30) are relatively wide.

Table 2-1 presents the results of questions asking office workers to characterize their degree of initiative on the job today and the degree of initiative they would prefer. Only 9% report that they are "pretty much told what to do and how to do it," while a minuscule 4% say they prefer this way of working; 38% say that they're "given a problem to solve or a goal to achieve, and...(they) figure out what to do and how to do it, with a somewhat lower 34% saying they prefer this degree of initiative"; and a plurality of 48% assert that they "identify problems or goals, and get them solved or achieved," while a nearly three in five majority (58%) would prefer to work this way. Those 40 and over are somewhat more likely than those under 40 to report that they "identify problems...and get them solved..." Not surprisingly, a majority of (self-described) managers say they work in the "self-starting" mode, while a plurality of nonmanagers say they're "given a problem to solve or goal to achieve, and...figure out what to do and how to do it. Even among nonmanagers, only 12% say they're typically told what to do, but this is three times the proportion of managers who report working in an "orders from above" mode (Table 2-2).

Although management encouragement of employee teamwork does not rank high on the list of office workers' priorities, there is nonetheless a 14-percentage-point aspiration gap between the 51% who deem this "very important" and the 37% who report it "very true" on their job today. On a mean basis U.S. office workers estimate they spend 20% of their time working as part of a formal team with others in their organization to accomplish a project or task, a somewhat higher 26% of their time working or consulting with others in their organization on an informal basis, and the greatest proportion of their time, 54%, working alone (which includes talking to clients or customers when no colleagues from their own organization are involved) (Table 2-3). While there is virtually no difference by size of organization in the proportion of time office workers say they spend engaged in formal teamwork, by their own reports those in the smallest organizations (100 employees or less) spend a greater amount of their time working alone than do those in larger organizations. Managers spend less of their time working alone and more of their time working informally with others than do nonmanagers. But there is little difference between managers and nonmanagers in the proportion of time they reportedly spend working on formal teams (Table 2-3).

Total Quality Management

Perhaps the larger context for the notion of the participative workplace is the concept of "total quality management." TQM derives from the seminal work of Juran and Deming several decades ago and has traditionally been applied in industrial settings; in recent years, the TQM concept has begun to make inroads into service sector and even governmental organizations. To judge from the results of the 1991 OEI, the concept has gained a firm foothold in the U.S. office environment overall. And the findings reveal an appetite for even more TQM implementation than has been seen up to now (Table 2-4):

-- 80% of U.S. office workers report their organization "fosters the notion of 'continuous improvement' of the work and the way things are done in the office"; an even higher 94% favor such an initiative.

-- 78% say their organization "measures the satisfaction of your office's customers or clients, either external or within the organization"; again, a higher 92% are in favor.

-- On a slightly lower tier of response, 67% report their organization has a "'do-it-right-the-first-time' philosophy for office work," with a higher 81% of office workers in favor of such an initiative.

-- 63% report their organization measures office worker productivity; a higher 80% are in favor.

-- Only a minority, 40%, say their organization offers its office employees incentive compensation linked to the quality of their work, but 82% would be in favor of this initiative. Clearly, office workers' appetite for this very concrete step far outstrips its current implementation.

By way of comparison, by far the smallest proportion -- a 24% minority -- report their organization offers its office workers incentive compensation linked to the quantity of their work -- which is not part of the quality management concept but one of a set of pre-TQM techniques for enhancing productivity per se. Although a 58% majority would favor such an approach, this represents many fewer office workers than favor each of the TQM initiatives.

Office workers in the largest organizations with over 5,000 employees nationwide are more likely than those in smaller organizations to report current initiatives to measure the satisfaction of external and internal customers or clients and measure productivity; those in organizations with over 100 employees are more likely than those in organizations with 100 or fewer employees to have a "do-it-right-the-first-time" philosophy (Table 2-5). From the accounts of office workers, service sector organizations seem to lead on fostering the notion of "continuous improvement" and measuring office worker productivity, while service sector and manufacturing organizations share a lead over public sector and nonprofit entities on having a "do-it-right-the-first-time" philosophy and incentive compensation linked to quality of work. Governmental organizations are behind others on measuring the satisfaction of external and internal clients.

With few exceptions, office workers across the board favor each of the TQM initiatives tested, including incentive compensation for quality of work (which shows the widest "gap" between current implementation and attractiveness), with little variation either by organization characteristics or personal demographics.

The reports of U.S. top executives on TQM initiatives undertaken and the degree to which they themselves favor such initiatives tend to parallel and confirm the findings for office workers (Table 2-6).

Productivity

There has been little change in the proportion of U.S. office workers who insist that they and their work colleagues "certainly do as much work as they reasonably can" since the 1986 OEI, which recorded a small but significant uptick on that measure from 1978 (from 42% to 46%). This year the proportion of office workers who feel they are "pushed to the wall" on productivity stands at 48%, unchanged from the 49% reported two years ago (Table 2-7).

Not surprisingly, managers are less likely than non-managerial employees to feel "pushed to the wall" on productivity (Table 2-8).

Throughout the years that the OEI has asked office workers to assess their own productivity with this measure, top executives and facilities managers have underestimated the extent to which office workers feel "pushed to the wall," and interior designers have similarly underestimated the productivity of their clients' office workers (Table 2-9). They still are much less likely than office workers themselves to believe the employees are doing as much as they can, but the degree of their underestimation is diminishing: the proportion of top executives who feel office workers are certainly doing as much as they can has increased from 21% to 33% since 1989, of facilities managers from 23% to 29%, and of interior designers -- always the most skeptical -- from 5% to 15% in the past two years.

Hours Put In

A sign of changing times: The median number of hours office workers report they work each week remains the same as reported two years ago (40 hours), but the proportion who consider this "too much" has increased significantly from 17% in 1989 to 21% today while the proportion who feel this is "just right" has decreased from 79% to 74% (Table 2-10). Median hours worked each week varies hardly at all by age, but is markedly higher among managers than among non-managerial employees and is slightly higher among those in manufacturing organizations than among those in other industry categories. But those 30-39 years of age (who report working one hour more than others on a median basis) seem more likely than those in other age groups to complain that this is too much, and managers are more likely than non-managers to feel their hours are excessive (Table 2-11). Interestingly, those who are "very" or "somewhat satisfied" with their job report they work only one hour less than those who are dissatisfied (40 vs. 41), but are markedly less likely to say they work too many hours (Table 2-12). Likewise, reported number of hours in the work week does not vary by reported productivity level, but those who feel "pushed to the wall" on productivity are more likely than those who feel they could do more to consider their hours excessive.

On a median basis, office workers report they spend four hours a week in meetings (not necessarily the same as working informally with colleagues or on formal project teams). This reading is unchanged since two years ago, and the proportion of office workers who feel this is too much time to spend in meetings -- 20% -- has not increased significantly over that period, either (Table 2-13). Managers report they spend a much higher median number of hours per week in meetings than do non-managers, and they are more likely to say they spend too much time in meetings; those in the largest organizations and in manufacturing companies -- each reporting one hour per week above average spent in meetings -- are also more likely than average to feel this is too much time to spend (Table 2-14).

Computer Use

The number of office workers who report they use distributed technology in the form of personal computers and terminals has risen dramatically in the past two years, from 78% in 1989 to 85% in 1991. In all, the proportion using such technology has climbed 19 percentage points since 1986 (Table 2-15). The proportion who say they use a computer five or more hours per day rose from 21% in 1986 to 25% in 1988 to 32% in 1989, and has stayed at about the same level (33%) in 1991.

Overall penetration of distributed processing in the office workplace is high across the board, although it is noticeably lower than average among those 50 and over and those in public sector organizations, while office workers in larger organizations are more likely to use computers than their counterparts in smaller ones.

Interestingly, there is no difference between managers and non-managers in overall use of PCs or terminals (Table 2-16). But there are more dramatic differences when it comes to using a computer five or more hours a day: the proportion saying they do so diminishes precipitously as age increases; non-managerial workers are much more likely than managers to say they spend at least five hours a day on the computer; and those in service sector organizations are (not surprisingly) much more likely than others to report spending at least this much time at the PC or terminal.

The proportion of top executives who report they have a terminal or PC in their office has likewise jumped from 57% in 1989 to a high 71% this year -- and has seen a meteoric rise of 26 percentage points since the question was first asked in 1986 (Table 2-17).

Observation:

Notwithstanding some lingering "aspiration gaps" on a handful of characteristics having to do with worker participation in the full life of the organization, total quality management and the participatory workplace seem to be ideas whose time has come in the office environment. What is noteworthy is the very high attractiveness of the concept to office workers and their bosses alike. Here is further evidence of what the OEI has been reporting since 1986: office workers want to participate, to contribute, to make things better, to make things work. The recession may have dampened spirits and lowered expectations, but in 1991 there would seem to be no way to turn the clock back on employee empowerment and participation. Indeed, it is possible that the "downsizing" of staff that many organizations have experienced -- along with the inexorable march toward full distributed systems -- has sealed the inevitability of employee participation.

OW-Q.16a, 16b

Table 2-1

DEGREE OF INITIATIVE: U.S. OFFICE WORKERS

	Office Workers	
Base	1008	
	Best Describes %	Prefer %
You're pretty much told what to do and how to do it	9	4
You're given a problem to solve or a goal to achieve, and you figure out what to do and how to do it	38	34
You identify problems or goals, and get them solved or achieved	48	58
Combination	6	3
Not sure	*	*

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*Less than 0.5%.

OW-Q.16a, 16b

Table 2-2

DEGREE OF INITIATIVE: U.S. OFFICE WORKERS BY AGE AND JOB LEVEL

("Best Describes")

	Total Office Workers	Age				Job Level	
		18-29	30-39	40-49	50+	Managerial	Non-Managerial
Base	1008	201	310	293	185	393	615
	%	%	%	%	%	%	%
You're pretty much told what to do and how to do it	9	12	9	6	7	4	12
You're given a problem to solve or a goal to achieve, and you figure out what to do and how to do it	38	41	43	32	38	30	43
You identify problems or goals, and get them solved or achieved	48	42	42	54	50	62	38
Combination	6	4	6	7	5	4	7
Not sure	*	1	-	*	-	-	*

---

*Less than 0.5%.

OW-Q.17

Table 2-3

PROPORTION OF WORK WEEK SPENT WORKING ALONE, INFORMALLY WITH OTHERS, AND ON FORMAL TEAMS: U.S. OFFICE WORKERS BY SIZE OF ORGANIZATION AND JOB LEVEL

		Size of Organization				Job Level	
	Total	100 or Less	101-500	501-5000	Over 5000	Managerial	Non-Managerial
Base	1008	121	167	253	344	393	615
Mean % of Time:							
Working alone	54	61	54	51	53	49	58
Working informally with others	26	21	26	29	26	30	24
Working on formal teams	20	18	20	19	21	21	19

OW-Q.4, 5

Table 2-4

TQM INITIATIVES: U.S. OFFICE WORKERS

	Office Workers	
Base	1008	
	Does	Favor
	%	%
Foster the notion of "continuous improvement" of the work and the way things are done in the office	80	94
Measure the satisfaction of your office's customers or clients, either external or within the organization	78	92
Have a "do-it-right-the-first-time" philosophy for office work	67	81
Measure office worker productivity	63	80
Offer its office workers incentive compensation linked to the quality of their work	40	82
Offer its office workers incentive compensation linked to the quantity of their work	24	58

OW-Q.4

Table 2-5

TQM INITIATIVES: U.S. OFFICE WORKERS BY SIZE AND TYPE OF ORGANIZATION

("Does")

		Size of Organization				Type of Organization			
	Total	100 or Less	101-500	501-5000	Over 5000	Manufacturing	Service	Non-Profit	Government
Base	1008	121	167	253	344	207	487	87	214
	%	%	%	%	%	%	%	%	%
Foster the notion of "continuous improvement" of the work and the way things are done in the office	80	76	80	80	81	77	84	76	77
Measure the satisfaction of your office's customers or clients, either external or within the organization	78	72	75	76	82	81	81	79	66
Have a "do-it-right-the-first-time" philosophy for office work	67	60	69	68	68	72	71	52	61
Measure office worker productivity	63	60	59	62	67	58	68	58	57
Offer its office workers incentive compensation linked to the quality of their work	40	38	42	40	41	42	45	28	31
Offer its office workers incentive compensation linked to the quantity of their work	24	31	23	22	24	19	27	21	22

CEO-Q.5a, 5b

Table 2-6

TQM INITIATIVES: U.S. TOP EXECUTIVES

	Top Executives	
Base	150	
	Organization Does	Would Favor
	%	%
Foster the notion of "continuous improvement" of the work and the way things are done in the office	86	97
Have a "do-it-right-the first time" philosophy for office work	75	91
Measure the satisfaction of your office's customers or clients, either external or within the organization	75	96
Measure office worker productivity	50	82
Offer its office workers incentive compensation linked to the quality of their work	39	83
Offer its office workers incentive compensation linked to the quantity of their work	31	63

OW-Q.3b

Table 2-7

PRODUCTIVITY: WHETHER OFFICE WORKERS DO AS MUCH AS THEY CAN: U.S. OFFICE WORKERS TREND

	Office Workers				
	1991 1008 %	1989 1041 %	1988 1031 %	1986 1000 %	1978 1047 %
Certainly do as much as can	48	49	47	46	42
Probably do as much as can	25	24	27	25	22
Could probably do more	26	26	26	28	34
Not sure	*	1	*	1	2

---

*Less than 0.5%.

OW-Q.3b

Table 2-8

PRODUCTIVITY: WHETHER OFFICE WORKERS DO AS MUCH AS THEY CAN: U.S. OFFICE WORKERS BY JOB LEVEL

		Job Level	
	Total	Managerial	Non-Managerial
Base	1008	393	615
	%	%	%
Certainly do as much as can	48	44	50
Probably do as much as can	25	28	24
Could probably do more	26	28	25
Not sure	*	*	1

---

*Less than 0.5%.

OW-Q.3b; CEO-Q.3b
FM-Q.4; ID-Q.3b

Table 2-9

PRODUCTIVITY: WHETHER OFFICE WORKERS DO AS MUCH AS THEY CAN: U.S. EXECUTIVES TREND

	Top Executives Answering About Their Employees				Facilities Managers Answering About Their Employees				Interior Designers Answering About Most Office Employees		
	1991	1989	1988	1986	1991	1989	1988	1986	1991	1989	1988
	150	150	150	150	150	150	150	150	150	150	150
Base	%	%	%	%	%	%	%	%	%	%	%
Certainly do as much as can	33	21	24	16	29	23	25	20	15	5	2
Probably do as much as can	35	39	37	44	30	31	33	37	39	29	26
Could probably do more	32	39	39	40	41	44	40	41	47	64	71
Not sure	1	-	-	-	1	3	2	1	-	2	1

OW-Q.F4a, F4b

Table 2-10

HOURS WORKED IN TYPICAL WEEK: U.S. OFFICE WORKERS TREND

	Office Workers		
	1991	1989	1988
Base	1008	1041	1031
Median hours work per week	40	40	41
	%	%	%
Consider that:			
Too much	21	17	19
Too little	5	3	5
Just right	74	79	75

OW-Q.F4a, F4b

Table 2-11

HOURS WORKED IN TYPICAL WEEK: U.S. OFFICE WORKERS BY AGE, JOB LEVEL AND TYPE OF ORGANIZATION

		Age				Job Level		Type of Organization			
	Total	18-29	30-39	40-49	50+	Managerial	Non-Managerial	Manufacturing	Service	Non-Profit	Government
Base	1008	201	310	293	185	393	615	207	487	87	214
Median hours work per week	40	40	41	40	40	45	40	42	40	40	40
	%	%	%	%	%	%	%	%	%	%	%
Consider that:											
Too much	21	18	25	20	20	25	19	22	21	19	21
Too little	5	7	4	3	4	5	5	4	6	4	4
Just right	74	73	71	76	76	70	76	74	72	76	75

OW-Q.F4a, F4b

Table 2-12

HOURS WORKED IN TYPICAL WEEK: U.S. OFFICE WORKERS BY JOB SATISFACTION AND PRODUCTIVITY

		Job Satisfaction		Productivity		
	Total	Very/ Somewhat Satisfied	Very/ Somewhat Dissatisfied	Certainly do As Much As Can	Probably do As Much As Can	Could Probably Do More
Base	1008	852	153	488	250	266
Median hours work per week	40	40	41	40	40	40
	%	%	%	%	%	%
Consider that:						
Too much	21	20	29	25	20	15
Too little	5	5	5	5	3	5
Just right	74	75	65	69	76	79

OW-4c, 4d

Table 2-13

HOURS SPENT PER WEEK IN MEETINGS:
U.S OFFICE WORKERS TREND

	Office Workers		
	1991	1989	1988
Base	1008	1041	1031
Median hours per week in meetings	4	4	3
	%	%	%
Consider that:			
Too much	20	18	17
Too little	10	13	13
Just right	69	67	69

OW-4c, 4d

Table 2-14

HOURS SPENT PER WEEK IN MEETINGS: U.S OFFICE WORKERS BY JOB LEVEL AND SIZE AND TYPE OF ORGANIZATION

		Job Level		Size of Organization				Type of Organization			
	Total	Managerial	Non-Managerial	100 or Less	101-500	501-5000	Over 5000	Manufacturing	Service	Non-Profit	Government
Base	1008	393	615	121	167	253	344	207	487	87	214
Median hours per week in meetings	4	7	3	3	5	4	5	5	4	5	4
	%	%	%	%	%	%	%	%	%	%	%
Consider that:											
Too much	20	29	15	15	20	22	26	31	16	22	24
Too little	10	6	12	12	13	8	9	10	11	7	9
Just right	69	65	72	73	67	70	65	59	73	70	69

OW-Q.15a, 15b

Table 2-15

USE OF TERMINALS AND PCs: U.S. OFFICE WORKERS TREND

	Office Workers			
	1991	1989	1988	1986
Base	1008	1041	1031	1000
	%	%	%	%
Total PC/Terminal Use	85	78	78	66
Use PC	32	29	28	x
Use terminal	24	26	23	x
Use both a terminal and a PC	27	23	27	x
Use equipment that serves as both a terminal and a PC	3	x	x	x
Don't use	15	22	22	34
Use 5+ hours/day	33	32	25	21
Median hours/day	4	4	3	3

OW-Q.15a, 15b

Table 2-16

USE OF TERMINALS AND PCs: U.S. OFFICE WORKERS BY REGION, AGE, JOB LEVEL, SIZE OF ORGANIZATION, TYPE OF ORGANIZATION

		Region				Age				Job Level		Size of Organization				Type of Organization			
	Total	East	South	Mid-west	West	18-29	30 39	40-49	50+	Ma-nage-rial	Non-Ma-nage-rial	100 or Less	100-500	501-5000	Over 5000	Manu-factu-ring	Ser-vice	Non-Profit	Govern-ment
Base	1008	330	252	255	171	201	310	293	185	393	615	121	167	253	344	207	487	87	214
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Use PC terminal	85	84	82	90	86	87	89	87	75	86	85	82	80	89	88	91	88	81	76
Use 5+ hours a day	33	33	32	35	33	40	37	30	24	19	42	35	26	35	33	32	40	27	20

CEO-Q.F5

Table 2-17

HAVE TERMINAL OR PC IN OFFICE: U.S. TOP EXECUTIVES TREND

	Top Executives			
	1991	1989	1988	1986
Base	150	150	150	150
	%	%	%	%
Total PC/Terminal in Office	71	57	50	45
Have PC	23	21	21	x
Have terminal	28	25	18	x
Have both (vol.)	21	10	11	x
Don't have	29	43	50	55

3: WORK AND THE FAMILY

Family Obligations: Children in the Household

Finding a way to manage the often conflicting demands of the workplace and the home has become a critical issue today. As reported earlier, a 69% majority of office workers feel that management "sensitivity to the need to balance job and family responsibilities" is a "very important" characteristic they look for in a job. But a much lower 35% say this is "very true" of their current job, for a gap of 34 percentage points. Top management -- estimating a 23-point gap -- does not fully grasp the extent of office workers' needs in this regard. The "baby boomlet" continues apace; 34% of all U.S. office workers report there is at least one child under twelve years of age living in their household. Not surprisingly, "management sensitivity to the need to balance job and family responsibilities" is more important to office workers with a child under twelve in their household than to office workers overall (for a higher-than-average "gap" on this characteristic). And while those with children work scarcely more hours than average each week (a median of 41 hours per week compared with 40 hours for all office workers), they are significantly more likely to view their hours as excessive (27% vs. 21%).

Table 3-1 profiles the 34% of U.S. office workers with children under twelve in the household. This subpopulation does not differ from U.S. office workers overall in its distribution by gender and job level, but not surprisingly shows a markedly higher-than-average proportion of 30-39 year olds (50% vs. 30% overall) and married people (83% vs. 65%). However, among those who are married, office workers with children under twelve in the household are not significantly less likely than office workers overall to report that their spouse is employed full-time (69% vs. 72%) and slightly more likely to report their spouse works part-time (15% vs. 11%); they are no more likely than married office workers overall to report that their spouse is unemployed (8% vs. 7%) or not employed but not looking for work (7% vs. 6%).

In all, relatively few full-time office workers with small children in the household report that they have a spouse who is a full-time homemaker and care provider for those children (Table 3-2). As many as 57% of office workers with small children in the household report they have a spouse who works full-time, and another 12% that they have a spouse working part-time. Another 9% report they are divorced, separated, or widowed, while 8% of those with small children in the household say they are single and have never been married; among each of those two groups, it may be assumed that some proportion are the parents of the children they report in the household. Finally, 6% are married and say their spouse is currently unemployed, and another 6% report their spouse is not employed but not looking for work (i.e., for this small proportion of those with children in the household, the spouse is likely to be a homemaker and full-time care-provider). So the findings suggest that, at the very least, nearly seven in ten office workers with children in the household (which translates to nearly one in four office workers overall) need to make some kind of child care arrangements.

Innovative Work Arrangements

Of the six types of innovative work arrangements tested in this year's OEI, only one -- "financial support or facilities for child care" -- shows a significant gap between the proportion of office workers who deem it "very important" (31%) and the proportion whose employers offer the option (15%). This item appears midway down a priority-ranked list which also includes (Table 3-3):

-- "Flexible benefits that you can tailor to meet your needs" (55% consider it "very important," while a statistically indistinguishable 53% report their employer offers it).

-- "Flexible hours that you can tailor to meet your needs": (50% deem it "very important," and a higher 55% say this arrangement is available to them).

-- "The opportunity to spend a portion of normal office hours working at home rather than in your office" (20% vs. 22%).

-- "The opportunity to do a job like yours part-time" (18% deem this "very important" while a much higher 29% say this option is available to them).

-- "An arrangement in which you actually split hours for a job with someone else, sometimes known as 'job sharing'" (15% vs. 17%).

What types of organization are most likely to offer each of these work arrangements? Flexible hours are more frequently reported by office workers at organizations in the Midwest than by those in other regions, in those with over 100 employees more frequently than in smaller organizations, and in the private sector more frequently than in government. The likelihood of offering flexible benefits increases with organization size and is greater in the West than in other regions. Manufacturing organizations are least likely to offer part-time work arrangements. The opportunity to work at home is extended more often by smaller organizations than by larger ones and is more frequently reported by employees in the private sector and in nonprofit organizations than in government. Job sharing, to the extent that it is reported, tends to be a midwestern and western phenomenon, is reported more often in larger organizations than in smaller ones, and is an arrangement most often found in government and least often in manufacturing. Financial support or facilities for child care is most often reported by office workers in the East and South, by those in larger organizations, and by those employed in governmental organizations (Table 3-4).

Each of the six types of work arrangements is seen as more important by women than by men. Younger office workers tend to be more concerned than older ones about having flexible benefits, flexible hours, financial support or facilities for child care, with the 30-39 year old group taking the lead on flexible hours and support for child care (Table 3-5).

Those with children under twelve in the household are more likely than average to see flexible benefits, flexible hours, financial or facilities support for child care, and the opportunity to work at home as "very important." Among this group, the "gap" between the percentage who deem child care support "very important" and the percentage for whom such support from their employer is currently available widens significantly (42% vs. 15%) because of the heightened priority given this arrangement (Table 3-6).

> Observation:
>
> Not surprisingly, office workers with young children in their household are more likely than others to value management sensitivity to their need for family time, and seem more likely than others to complain that their hours are too long. From the findings, it would appear that a substantial majority of office workers with children must, in order to work, make an arrangement with a care provider other than the traditional "stay-at-home" spouse. While many in this category might not want or need child care assistance from their employer, as many as 42% attach the highest importance to a benefit of this kind. But only 15% report their employer offers such a benefit, and other findings indicate that few organizations set aside space in their own facilities for child care.
>
> Other innovative work arrangements might be useful to working parents as well, and employers appear to have done a much better job of meeting the demand for them from the working parents in their offices. These include flexible benefits (which might include the ability to pay for child

care with pretax dollars), and a set of job arrangements which might facilitate coordination with children's and spouses' schedules or simply allow more time at home with the kids: flexible hours; the opportunity to do some work at home; the opportunity to work part-time; the opportunity to split hours for a job with someone else.

OW-Q.F10

Table 3-1

PROFILE OF U.S. OFFICE WORKERS WITH CHILDREN UNDER 12 IN HOUSEHOLD (34% OF TOTAL)

	Total U.S. Office Workers	Office Workers With Children Under 12 In Household
Base	1008	342
	%	%
Sex		
Male	47	50
Female	53	50
Age		
18-29	22	19
30-39	30	50
40-49	29	24
50+	18	5
Job Level		
Managerial	39	39
Non-managerial	61	61
Marital Status		
Married/living with partner	65	83
Divorced/separated/widowed	13	9
Single/never married	21	8
Employment Status of Spouse (Base: Married)	(652)	(285)
	%	%
Employed full-time	72	69
Employed part-time	11	15
Unemployed	7	8
Not employed but not looking for work	6	7
Retired	3	-

OW-Q.F9a, F9b, F10

Table 3-2

MARITAL STATUS OF U.S. OFFICE WORKERS WITH CHILDREN UNDER 12 IN HOUSEHOLD

	Have Children Under 12 in Household
Base	342
	%
Divorced/separated/widowed	9
Single/never married	8
Married, spouse employed full-time	57
Married, spouse employed part-time	12
Married, spouse unemployed	6
Married, spouse not employed but not looking for work	6

OW-Q.6a, 6b

Table 3-3

IMPORTANCE AND PREVALENCE OF INNOVATIVE WORK ARRANGEMENTS: U.S. OFFICE WORKERS

Base	Office Workers 1008	
	Important	Employer Offers
	%	%
Flexible benefits that you can tailor to meet your needs	55	53
Flexible hours that you can tailor to meet your needs	50	55
Financial support or facilities for child care offered by your employer	31	15
The opportunity to spend a portion of normal office hours working at home rather than in your office	20	22
The opportunity to do a job like yours part-time	18	29
An arrangement in which you actually split hours for a job with someone else, sometimes known as job sharing	15	17

OW-Q.6b

Table 3-4

PREVALENCE OF INNOVATIVE WORK ARRANGEMENTS: U.S. OFFICE WORKERS BY REGION, SIZE OF ORGANIZATION, AND TYPE OF ORGANIZATION

		Region				Size of Organization				Type of Organization			
	Total	East	South	Mid-west	West	100 or Less	101-500	501-5000	Over 5000	Manu-fac-turing	Ser-vice	Non-Profit	Gov-ern-ment
Base	1008	330	252	255	171	121	167	253	344	207	487	87	214
	%	%	%	%	%	%	%	%	%	%	%	%	%
Flexible hours that you can tailor to meet your needs	55	54	53	60	52	49	59	54	57	56	55	62	50
Flexible benefits that you can tailor to meet your needs	53	53	52	52	58	34	51	56	61	54	55	48	52
The opportunity to do a job like yours part-time	29	28	32	31	27	26	24	32	28	22	31	36	29
The opportunity to spend a portion of normal office hours working at home rather than in your office	22	23	22	21	22	28	30	19	20	21	24	33	15
An arrangement in which you actually split hours for a job with someone else, sometimes known as job sharing	17	16	13	23	20	11	14	20	20	9	18	17	23
Financial support or facilities for child care offered by your employer	15	18	19	11	13	3	5	16	23	11	14	12	23

OW-Q.6a

Table 3-5

IMPORTANCE OF INNOVATIVE WORK ARRANGEMENTS: U.S. OFFICE WORKERS BY SEX AND AGE

("Very Important")

		Sex		Age			
	Total	Male	Female	18-29	30-39	40-49	50+
Base	1008	468	540	201	310	293	185
Flexible benefits that you can tailor to meet your needs	55	47	61	62	57	50	50
Flexible hours that you can tailor to meet your needs	50	43	56	52	60	46	39
Financial support or facilities for child care offered by your employer	31	22	39	33	40	28	20
The opportunity to spend a portion of normal office hours working at home rather than in your office	20	17	22	18	24	19	19
The opportunity to do a job like yours part-time	18	9	27	17	21	14	24
An arrangement in which you actually split hours for a job with someone else, sometimes known as job sharing	15	9	19	13	15	15	16

OW-Q.6a, 6b

Table 3-6

IMPORTANCE AND PREVALENCE OF INNOVATIVE WORK ARRANGEMENTS: U.S. OFFICE WORKERS WITH CHILDREN IN HOUSEHOLD

Base: Children under 12 in household

	Office Workers	
Base	340	
	Very Important %	Employer Offers %
Flexible benefits that you can tailor to meet your needs	64	57
Flexible hours that you can tailor to meet your needs	55	59
Financial support or facilities for child care offered by your employer	42	15
The opportunity to spend a portion of normal office hours working at home rather than in your office	25	21
The opportunity to do a job like yours part-time	20	30
An arrangement in which you actually split hours for a job with someone else, sometimes known as job sharing	16	15

4: ENVIRONMENTAL, HEALTH, AND SAFETY ISSUES

Safeguarding the Natural Environment

The natural environment emerges this year as a serious concern for office workers thinking about their workplace and their job, and one which they believe is not getting enough attention from management (see Table 1-13). Fully 74% of U.S. office workers deem it "very important" that management recognize and support the need to protect the natural environment. The problem is that only 41% feel this is "very true" of their organization -- for a gap of 33 percentage points. Top executives grossly underestimate office workers' concern for the natural environment, with only 43% guessing most of their office employees would see it as "very important."

While a 67% majority of U.S. office workers (highest in the East and West and among larger organizations) report their organization has a program for recycling materials such as paper, a virtually unanimous 97% would favor such a program (Table 4-1). An 82% majority of top executives report their organization has a recycling program, and an even higher 94% correctly guess that most of their office employees would favor such a program.

Health and Safety Issues

As will be seen in the next chapter of this report, health and safety regulations and legislation are seen as having an increasing impact on office facilities design by top executives, facilities managers, and designers alike. Among each of these groups, the proportion who believe health and safety legislation and regulation will have "a great deal of impact" on facilities design in the next five years has increased from 1989 to 1992 (see Table 5-22).

This year's findings show a significant increase since 1989, from 50% to 56%, in the proportion of U.S. office workers who report their organization has a substance abuse program but a decrease from 42% to 38% in the proportion aware of an information program about the impact of AIDS in the workplace (Table 4-2). There has also been a small uptick in the small number who report their employer screens prospective employees for AIDS (from 8% to 11%), while the proportion who say their workplace offers a proactive health care program has stayed the same, at 54%. Fully 38% say their organization requires pre-employment drug testing for new hires, while as many as 23% say their management requires drug testing for current employees.

There has been no real change since two years ago in the proportion of office workers in favor of these policies; the proportion for whom each is attractive runs considerably higher than the proportion who say it has been implemented in their workplace. Overwhelming 91% majorities support substance abuse and proactive health programs; 83% favor providing employees with information about AIDS in the workplace; and 71% and 65% majorities, respectively, favor drug testing for new hires and current employees. Nearly half (48%) favor AIDS testing for prospective employees.

Testing for AIDS and drug use would appear from these findings to be most prevalent among organizations in the South, while the degree of implementation of all six types of initiatives increases markedly with organization size (Table 4-3). While the findings show across-the-board support for alcohol and drug abuse programs, proactive health care programs, and -- with some variation in degree -- programs to provide information about AIDS in the workplace, testing for drug use and screening for AIDS receives far less support among college graduates than among those with less education (Table 4-4).

Interestingly, management underestimates the extent to which office employees would favor drug testing for both new hires and current employees, and pre-employment AIDS screening (Table 4-5).

Hazards in the Office Workplace

Concern among U.S. office workers about four office workplace hazards has risen since 1989.

As in 1989, eyestrain tops the list of hazards that office workers were asked to evaluate; the proportion considering this a "very" or "somewhat serious" problem at their job location was 44% two years ago and is 47% today. There is a significant increase in concern over the past two years for the quality of the air you breathe (37% at least "somewhat serious," up from 27% in 1989) and potential harmful radiation from video display terminals (36%, up from 27%). A hazard tested for the first time this year, the risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard, is deemed serious by 33% of U.S. office workers. Finally, concern about exposure to hazardous materials in your building is up from 12% two years ago to 19% this year (it should be noted that the example of asbestos was included in 1989 but dropped this year) (Table 4-6).

Those who report they use a PC or terminal five or more hours a day are considerably more likely than average to view eyestrain, repetitive strain injuries, and potential harmful radiation from VDTs as serious hazards (Table 4-7).

Asked how much of a problem these hazards are for their office workers, top executives tend to understate the seriousness of each, and are somewhat less likely than they were in 1989 to guess that eyestrain, air quality, and exposure to hazardous materials in the building are at least "somewhat serious" problems (Table 4-6). Facilities managers understate the seriousness to office workers of air quality, potential harmful radiation from VDTs, and the risk of repetitive strain injuries, and express less concern abo hazardous materials in the building than they did two years ago. Interior designers considerably *overstate* the level of concern that office workers express about each of the hazards, with increases since 1989 in the proportion of designers who think air quality, potential harmful radiation from VDTs, and exposure to hazardous materials are at least "somewhat serious" problems for most office workers.

> *Observation*:
>
> Not a day seems to go by without media attention to the natural environment and to the health and safety of individuals. The high level of concern that Americans overall express about these issues is reflected, not surprisingly, in the findings from the *OEI* survey of office workers.
>
> Office workers' concern that their organizations do something to protect the natural environment, grossly underestimated by the bosses, is high across the board. Virtually all office workers count themselves in favor of a recycling policy in their organization. The good news is that over two-thirds report their organization has such a policy.
>
> Although executives and interior designers predict that employee health and safety issues will have an increasing impact on facilities design in the next few years, they do not express the same increasing concern that office workers show about air quality, radiation from VDTs, exposure to hazardous materials in their building, and eyestrain. And, notwithstanding the privacy rights issues that have been raised about some of the initiatives employers are taking to promote the health and safety of their employees, large majorities of office workers would support not only substance abuse, "wellness," and AIDS information programs, but drug testing of new hires and current employees, and nearly half would support AIDS screening. For each kind of policy tested, many more office workers would favor it than report it has been implemented in the organization. From the point of view of office workers, there is room for improvement.

OW-Q.8a, 8b; CEO-Q.8a, 8b

Table 4-1

RECYCLING PROGRAM

	Total %
Office Workers	
(Base)	(1008)
Organization has program	67
Favor	97
Top Executives	
(Base)	(150)
Organization has program	82
Most employees would favor	94

OW-Q.8a, 8b

Table 4-2

HEALTH AND SAFETY POLICIES:
U.S. OFFICE WORKERS TREND

	Office Workers			
	Organization Does		Would Favor	
	1991	1989	1991	1989
Base	1008	1041	1006	1041
	%	%	%	%
Have an alcohol or drug abuse program	56	50	91	92
Have a program for promoting good health habits	54	55	91	90
Provide employees with information about the impact of AIDS in the workplace	38	42	83	86
Require pre-employment drug testing for new hires[1]	38	X	71	X
Require drug testing for current employees[1]	23	X	65	X
Screen prospective employees for AIDS	11	8	48	47

---

[1] In 1989, was worded "have mandatory drug testing for employees"; 20% said their organization did, 56% that they would favor it.

OW-Q.8a

Table 4-3

HEALTH AND SAFETY POLICIES IMPLEMENTED: U.S. OFFICE WORKERS BY REGION AND SIZE OF ORGANIZATION

		Region				Size of Organization			
	Total	East	South	Midwest	West	100 or Less	101 to 500	501 to 5,000	Over 5,000
Base	1008	330	252	255	171	121	167	253	344
	%	%	%	%	%	%	%	%	%
Have an alcohol or drug abuse program	56	57	58	55	53	18	39	60	74
Have a program for promoting good health habits	54	54	57	53	51	33	38	59	66
Provide employees with information about the impact of AIDS in the workplace	38	37	44	35	37	21	29	36	48
Require pre-employment drug testing for new hires	38	37	49	32	33	16	25	36	54
Require drug testing for current employees	23	23	32	15	22	10	17	20	35
Screen prospective employees for AIDS	11	8	19	9	7	6	6	9	16

CEO-Q.8b

Table 4-4

SUPPORT FOR HEALTH AND SAFETY POLICIES: U.S. OFFICE WORKERS BY EDUCATION LEVEL

		Education Level	
	Total	Less Than College Graduate	College Graduate
Base	1008	526	424
	%	%	%
Have an alcohol or drug abuse treatment program	91	92	90
Have a program for promoting good health habits	91	90	94
Provide employees with information about the impact of AIDS in the workplace	83	81	85
Require pre-employment drug testing for new hires	71	75	64
Require drug testing for current employees	65	71	56
Screen prospective employees for AIDS	48	56	38

CEO-Q.8a, 8b

Table 4-5

HEALTH AND SAFETY POLICIES: U.S. TOP EXECUTIVES

	Top Executives	
	150	
Base	Organization Does	Most Employees Would Favor
	%	%
Have a program for promoting good health habits	71	91
Have an alcohol or drug abuse treatment program	67	85
Provide employees with information about the impact of AIDS in the workplace	61	77
Require pre-employment drug testing for new hires	35	53
Require drug testing for current employees	23	39
Screen prospective employees for AIDS	3	39

OW-Q.7; CEO-Q.7;
FM-Q.5; ID-Q.4

Table 4-6

HAZARDS IN OFFICE WORKPLACE: U.S. OFFICE WORKERS AND EXECUTIVES TREND

("Very" or "Somewhat Serious")

	U.S.							
	Office Workers		Top Executives		Facilities Managers		Interior Designers	
	1991	1989	1991	1989	1991	1989	1991	1989
Base	1008	1041	150	150	150	150	150	150
	%	%	%	%	%	%	%	%
Eyestrain	47	44	30	36	43	40	89	86
The quality of the air you breathe	37	27	25	32	31	35	84	78
Potential harmful radiation from video display terminals	36	27	24	22	22	18	75	41
The risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard	33	X	28	X	21	X	71	X
Exposure to hazardous materials[1] in your building	19	12	12	17	17	25	71	65

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[1] In 1989, the example, "... such as asbestos," was provided.

OW-Q.7

Table 4-7

HAZARDS IN OFFICE WORKPLACE: U.S. OFFICE WORKERS BY COMPUTER USE

("Very" or "Somewhat Serious")

	Total	Use Computer	Use Computer 5+ Hours Per Day
Base	1008	860	323
	%	%	%
Eyestrain	47	50	66
The quality of the air you breathe	37	37	41
Potential harmful radiation from video display terminals	36	39	51
The risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard	33	34	50
Exposure to hazardous materials in your building	19	18	19

5: FACILITIES AND DESIGN ISSUES

Usual Workspace Arrangements

There has been little change over the past several years in the kinds of workspace arrangements office workers report they have: today, 39% say their usual workspace is a private office with a door (30% report they are the sole occupant); 31% say their usual workspace is "a partitioned space divided by screens or panels that's part of a so-called 'open-plan' system"; and 29% say their usual workspace is "an open space with groups of workers." This reading is virtually the same as taken in both 1989 and 1988; a significant shift away from open space shared with others to private offices was recorded for the period between 1986 and 1988 (Table 5-1).

It's no surprise that private offices are much more likely to be reported by managerial level than by non-managerial level employees and that thus the propensity to report a private office increases with age and income (and, for that matter, that men are much more likely than women to have private offices). However, it may be worth noting that private offices (whether shared with a colleague or single-occupancy) seem to be more prevalent in the South and East than in the Midwest and West, more prevalent in smaller organizations than in the very largest ones, and less often reported in the service sector than in manufacturing, non-profit, and government organizations (Table 5-2). Partitioned workspace is most frequently reported in larger organizations and in for-profit private sector companies, while open workspace is most often reported in the very smallest organizations, in the service sector, and in government.

In contrast with office workers, facilities managers report a real shift since 1989 in the form of an increase in the mean percentage of office employees in their organization who work in private offices and a decrease in the percentage with partitioned workspaces. This shift is reflected as well in facilities managers' predictions made in 1989 and this year for the kinds of offices their employees will have in five years' time (Table 5-3). However, U.S. interior designers report little change since two years ago in the mix of office types included in their designs.

Standards Programs and Choice in Workspace Detail

While the proportion of office workers reporting that their "job entitles them to a certain type of workspace, furniture, and accessories" dropped sharply from 69% in 1988 to 55% in 1989, this year's reading -- 54% -- is virtually unchanged since two years ago (Table 5-4). The 54% comprises 30% of all office workers who believe that this is "a formal policy of their organization" and another 23% of the total who feel "things just work out that way." In any case, 78% of all office workers would favor "a formal program to make sure that workers at the same level have a similar workspace, furniture, and accessories."

Office workers in the South, in the largest organizations, and in manufacturing companies seem most likely to report that their job entitles them to certain things; those in the East, in the smallest organizations (with 100 or fewer employees), and those in governmental organizations are somewhat less likely than others to favor a formal standards program (Table 5-5). The likelihood of reporting that their job entitles them to certain types of workspace, furniture, and accessories also tends to increase with age and job level -- suggesting a sense of entitlement to the accoutrements of success at the higher management strata of organizations (Table 5-6). If anything, however, the findings suggest that managers are somewhat less in favor of the standards program than are non-managers.

From the reports of facilities managers, it would appear that fewer organizations have a standards program this year than did in 1989 (in total, 48% compared with 54% either organization-wide or in some locations) (Table 5-7). However, among contract interior designers there has been a steady upward trend since 1988 in the proportion who say that practically all of their clients have standards programs -- from 35% in 1988 to 47% in 1989 to 52% today -- not so different than the 48% of facilities managers that report their organizations have such programs (Table 5-8).

Just over half of U.S. office workers -- about the same proportion as two years ago -- assert that they have "some choice on details of [their] workspace, furniture, or accessories" (53%, up insignificantly from 51% in 1989) (Table 5-9). Not surprisingly, managers and those with higher salaries are more likely than lower-salaried, non-managerial personnel to report they have any choice on their workspace details; correspondingly (and utterly predictably) those in private offices are much more likely to report having a choice than those in either partitioned or open space. The likelihood of having a choice in these details is higher in the South and Midwest than in the East or West; higher among smaller organizations (500 or fewer employees) than among larger ones; and higher in manufacturing organizations and nonprofits than in service industry organizations or government entities (Table 5-10).

Nearly two-thirds (63%) of U.S. facilities managers today -- about the same as the 59% recorded in 1989 -- report that their office employees have "some choice" in workspace details (Table 5-11). A much lower proportion of U.S. contract interior designers (21% both today and in 1989) estimate that practically all of their clients allow their office employees some choice in workspace detail (Table 5-12).

Specific Features of the Workspace

The findings reveal a considerable shortfall between office workers' expectations for their personal workspace and the reality they confront in the office each day. On six out of eight key features of the personal workspace tested in the OEI for 1991, there are significant "gaps" between the proportion of office workers who deem the characteristic "very important" to their productivity and the proportion who say it is "very true" of their own workspace (Table 5-13):

-- The feature that office workers give top priority is proper lighting; 92% consider this "very important," while 64% say it's "very true" of their own workspace -- for a gap of 28 percentage points.

-- Next in priority comes comfortable heating and air conditioning, which 82% deem "very important" and only 44% say is "very true" for them, for a gap of 38 points.

-- 75% say having enough worksurface space to display or spread out work is "very important"; 46% say it's "very true," for a 29-point gap.

-- 75% say having a comfortable chair that can be adjusted to your needs is "very important," while 56% say it's "very true," for a gap of 19 points.

-- Adequate storage and file space is seen as "very important" by 62%, compared with 39% who say this is "very true" of their workspace -- for a gap of 23 points.

-- 60% deem enough privacy and quiet "very important," while only 30% say this is "very true" of their workspace, a gap of 30 points.

The two features which do not show such gaps are those which rank lowest in priority:

-- An office or work area close to people you work with on a regular basis is seen as "very important" by 55% and "very true" in their own situation by 56%.

-- 54% consider adequate meeting space in or near your office or workspace "very important," while 50% say this is "very true" for them, for a small gap of only 4 percentage points.

Not surprisingly, those with private offices -- translating loosely to managerial-level personnel -- show a below-average gap on most features. Interestingly, those in partitioned space show wider gaps on several features than those in open space -- especially on comfortable heat and air conditioning (those in partitioned space view conditions as worse), adequate storage or file space (both higher expectations and worse perceived conditions), and enough privacy and quiet (entirely a case of higher expectations). Heavy computer users -- who are overwhelmingly a non-managerial, lower-salaried subset of the office worker population and who most frequently describe their workspace as partitioned -- show wider-than-average gaps on having a comfortable chair, having enough worksurface to spread work out, and proper lighting. The employees of larger organizations -- and government entities -- tend to be less satisfied than others on many of these features. Regionally, having adequate meeting space near one's workspace is more of an issue in the Midwest and West than in the East or South; HVAC seems to be less of a problem in the South than elsewhere; the gap on lighting is wider in the East and West than in the South or Midwest, while government employees show wider gaps than office workers in other industries on five of the eight items (Table 5-14).

Those who report that they have good lighting in their personal workspace (i.e., who say it is "very true" of their workspace) are much less likely than those who do not to consider eyestrain a "very" or "somewhat serious" hazard. Likewise, those who say they have comfortable heating and air conditioning are much less likely than those who do not to consider air qualit a serious hazard.

Facilities managers show a good understanding of the shortfalls offi workers report on having a comfortable chair, adequate file and storage space, and sufficient privacy and quiet. But they do not seem to grasp the degree tc which office workers find their heating and air conditioning, lighting, and worksurface inadequate in supporting their productivity.

Office interior designers, answering about their clients' office workers, tend to overestimate the gap shown for office workers nationwide on most features (Table 5-13).

Common Facilities

Nearly three in five office workers report their organization's off facilities have "areas specifically set aside for training" (58%) and "rooms other areas set aside for ongoing work on specific projects" (57%); about one-half (51%) say there are "areas other than the cafeteria or conference r where employees can get together to meet and talk informally"; and a minuscu 7% report "areas set aside for child care" (Table 5-15). The likelihood of having these facilities is remarkably similar for organizations ranging in s from 101 employees to over 5,000 employees nationally, although apparently somewhat lower for organizations with 100 or fewer employees; the likelihood reporting training areas, however, increases dramatically with employee size By organization type, private sector organizations (both manufacturing and service) appear more likely than government or nonprofit organizations to h project rooms or areas, while the government and nonprofit sectors are more likely than the private sector to set aside space in the organizations' facilities themselves for child care. Since the last reading in 1989, the proportion of office workers reporting their organization offers informal meeting areas has risen significantly (from 46% to 51%), but there has been no change on the other facilities tested (Table 5-16).

Table 5-17 arrays the findings on common facilities from facilities managers, which (in the scheme of things) track fairly closely with the reports of office workers, although the results for facilities managers suggest an uptick in the prevalence of training areas, informal meeting areas, and areas set aside for child care but a decrease in the number of organizations which have rooms set aside for specific projects.

The Facilities Management Function

The facilities management function is coming of age.

From the accounts of top executives, there appears to have been an increase over the past two years in the number of U.S. organizations with a full-time facilities management staff: 63% report they have full-time facilities management today, up from 57% in 1989 (Table 5-18). During the same time period, the proportion of top executives who see their organization's facilities design and management function "more as asset management" rather than "more as an expense" has risen from 63% to 71%. And while the proportion who believe the facilities plan at their organization should be linked to the business plan "a great deal" (61%) remains greater than the proportion who say the facilities plan is linked to the business plan "a great deal" today (43%), the proportion who today say there is "a great deal" of linkage is up significantly from the proportion who said that the last time the reading was taken, in 1988 (28%). Facilities managers are more skeptical; only 47% believe that their top management regards facilities design and management as a form of asset management, and only 29% say their organization's facilities plan is linked "a great deal" to the business plan.

There has been no significant change since 1989 in the frequency with which contract interior designers say they find themselves working with a client organization's facilities department: 61% say they do so "frequently," the same as the 63% recorded two years ago (Table 5-19). While in 1989, designers by 55-42% tilted toward the view that senior management at their clients' organizations tend to regard the money they spend on facilities management more as an expense than as asset management, opinion has shifted this year, with a 53-42% majority now taking the view that their clients see facility management more as asset management than as an expense. A big 70% majority of designers believe facilities plans should be linked to an organization's business plan "a great deal"; only 17% say that in most of their clients' organizations facilities plans are linked to the business plan "a great deal," although as many as 74% say they are linked at least "somewhat."

The Use of Outside Design Professionals

Top executives and facilities managers agree: the use of outside design professionals has been steadily increasing since 1988 (Tables 5-20, 5-21).

Nearly two-thirds of top executives today (65%) report their organization routinely engages outside design professionals, an increase from 59% in 1989 and 44% in 1988. Among facilities managers, the reading is 68% today, up from 61% in 1989 and 38% in 1988.

According to facilities managers who say their organization routinely engages design professionals, 23% assert that the designers influence furniture and equipment standards "to a great extent," while 55% altogether say designers influence their standards at least "somewhat."

This year, over half of top executives who say their organization routinely engages design professionals (51%) are "very satisfied" with those professionals, while an overwhelming 90% are at least "somewhat satisfied." In 1989, 42% of those engaging outside design professionals were "very satisfied," and 89% at least "somewhat satisfied." Facilities managers whose organizations engage outside design professionals are slightly more modest in their praise, but no less positive overall: 38% are "very satisfied" and 87% at least "somewhat satisfied" today, and these marks have not changed significantly from the ones they gave their outside designers in 1989.

Among facilities managers whose organizations regularly engage outside design professionals, 67% report that they have recently used them for architectural or interior design (including programming and schematic design), 37% for ongoing facilities management such as reconfiguration and refurbishment, and 12% for consultation.

Trends Expected to Impact Facilities Design

Top executives and facilities managers in the U.S. largely concur on the degree of impact that various trends and concerns will have on facilities design in the next five years or so. Their assessments diverge on only a handful of items that rank toward the bottom of the prioritized list for both groups.

Topping the list for both groups is telecommunications and computer needs (71% of both top executives and facilities managers expect this will have "a great deal of impact"). This is followed somewhat distantly by the need to attract and retain skilled employees (55% of each group), space costs (53% of top executives, 49% of facilities managers), health and safety legislation and regulation (49% of each group), and the need to utilize existing furniture rather than purchase new furniture (48%, 43%). Further down the list come an increasingly participative work environment (43%, 37%), costs for office furniture and equipment (39%, 28%), office worker involvement in the design of the work environment (21%, 17%), and finally worker desire for privacy (18%, 13%) (Table 5-22).

Interior designers offer a somewhat different ranking of priorities which pushes cost concerns nearer to the forefront: while they are even more emphatic than top executives and facilities managers in anticipating that telecommunications and computer needs will have "a great deal of impact" (92%), space costs rank second among designers (77%), followed by the need to attract skilled employees (63%) and costs for office furniture and equipment (61%) at about the same level of response. Next come the need to utilize existing furniture and equipment (48%) and health and safety legislation and regulation (47%), followed by an increasingly participative work environment (33%). Like top executives and facilities managers, designers put office worker involvement in the design of the work environment (15%) and worker desire for privacy (17%) at the bottom of the list.

A comparison of this year's findings from those of 1989 suggest that the perceived impact of telecommunications and computer needs is leveling off or even declining as the environment for distributed processing matures, while concern about the impact of health and safety legislation and regulation has risen among top executives, facilities managers, and designers alike (Table 5-23). Interestingly, among top executives and facilities managers, concern about the impact of space costs on design is leveling out or declining (although it seems to be on the rise among designers!), while concern about furniture and equipment costs seems to be growing, at least among top executives and interior designers.

Observation:

Facilities management and design are clearly coming of age in America, even if facilities managers themselves express some skepticism about the role of their function in top-level planning. There is much work to be done on the physical environment of the office, with office workers reporting significant gaps between their expectations and reality on several key features of the personal workspace. In view of the needs of working parents, discussed in an earlier chapter, few office workers report their organization has facilities for onsite child care, although many organizations seem to be providing facilities support for teamwork and a participative work environment in the form of dedicated project areas and areas designed for informal contact among employees.

The apparent decline in standards programs over the last several years may reflect the evolution of the participative workplace and management efforts to minimize the trappings of a hierarchical organization structure.

OW-Q.10

Table 5-1

USUAL WORKSPACE ARRANGEMENT:
U.S. OFFICE WORKERS TREND

	Office Workers			
	1991	1989	1988	1986
Base	1008	1041	1031	1000
	%	%	%	%
Private	39	38	40	33
Partitioned	31	32	31	31
Open with others	29	28	28	35
Other	*	1	1	1

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*Less than 0.5%.

OW-Q.10

Table 5-2

USUAL WORKSPACE ARRANGEMENT: U.S. OFFICE WORKERS BY REGION, SIZE OF ORGANIZATION, AND TYPE OF ORGANIZATION

		Region				Size of Organization				Type of Organization			
	Total	East	South	Mid-west	West	100 or Less	101-500	501-5000	Over 5000	Manu-facturing	Service	Non-Profit	Government
Base	1008	330	252	255	171	121	167	253	344	207	487	87	214
	%	%	%	%	%	%	%	%	%	%	%	%	%
Private	39	40	43	36	36	43	46	40	36	41	33	59	42
Partitioned	31	31	28	34	33	21	26	34	35	39	34	23	23
Open with others	29	29	28	30	31	35	27	26	28	20	32	19	34
Other	*	*	*	-	-	-	-	1	-	-	*	-	-

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*Less than 0.5%.

FM-Q.7a, 7b
ID-Q.6a, 6b

Table 5-3

OFFICE ARRANGEMENTS IN PLACE NOW AND FIVE YEARS FROM NOW: U.S. FACILITIES MANAGERS AND INTERIOR DESIGNERS TREND

	Facilities Managers Mean % of Office Employees		Interior Designers: Mean % of Facilities Designed	
	1991	1989	1991	1989
Base	150	150	150	150
Today/In Past Year:				
Private	39	31	36	38
Partitioned	40	47	51	51
Open	21	21	13	11
Expected Five Years From Now:				
Private	38	29	33	28
Partitioned	45	51	54	52
Open	18	19	13	10

Q.12b, 12d

Table 5-4

STANDARDS PROGRAM: U.S. OFFICE WORKERS TREND

	Office Workers		
	1991	1989	1988
Base	1008	1041	1031
	%	%	%
Job entitles them to certain types of workspace, furniture, accessories	54	55	69
Favor formal program	78	NA	82
Oppose formal program	19	NA	14

OW-Q.12b, 12c, 12d

Table 5-5

STANDARDS PROGRAM: U.S. OFFICE WORKERS BY REGION, SIZE OF ORGANIZATION AND TYPE OF ORGANIZATION

		Region				Size of Organization				Type of Organization			
Base	Total 1008 %	East 330 %	South 252 %	Mid-west 255 %	West 171 %	100 or Less 121 %	101-500 167 %	501-5000 253 %	Over 5000 344 %	Manu-fac-turing 207 %	Ser-vice 487 %	Non-Profit 87 %	Gov-ern-ment 214 %
Job entitles them to certain types of workspace, furniture, accessories	54	50	58	54	54	53	52	51	57	65	54	50	44
Formal policy	30	28	32	32	26	17	20	30	38	37	28	24	28
Just works out	23	22	25	21	28	36	32	20	18	27	25	25	15
Both	*	*	-	1	*	-	-	*	1	-	*	-	1
Favor formal program	78	75	81	77	81	73	77	80	78	80	80	79	75
Oppose formal program	19	22	16	20	17	23	20	18	19	19	18	16	22

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*Less than 0.5%.

OW-Q.12b, 12c, 12d

Table 5-6

STANDARDS PROGRAM: U.S. OFFICE WORKERS
BY AGE AND JOB LEVEL

		Age				Job Level	
	Total	18-29	30-39	40-49	50+	Managerial	Non-Managerial
Base	1008	201	310	293	185	393	615
	%	%	%	%	%	%	%
Job entitles them to certain types of workspace, furniture, accessories	54	49	52	54	62	57	52
Formal policy	30	22	27	35	34	31	29
Just works out	23	27	24	19	27	26	22
Both	*	-	1	-	1	*	*
Favor formal program	78	79	78	74	83	76	80
Oppose formal program	19	19	20	22	13	22	17

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*Less than 0.5%.

FM-Q.8b

Table 5-7

STANDARDS PROGRAMS:
U.S. FACILITIES MANAGERS TREND

	Facilities Managers		
	1991	1989	1988
Base	150	150	150
	%	%	%
Organization has standards program	41	49	51
Does not have	51	45	49
In some locations but not others	7	5	-

ID-Q.7b, 7c

Table 5-8

STANDARDS PROGRAMS: U.S.
INTERIOR DESIGNERS TREND

	Interior Designers		
	1991	1989	1988
Base	150	150	150
	%	%	%
Practically all clients have standards programs	52	47	35
Only some	39	42	52
Practically none	9	11	13

OW-Q.12a

Table 5-9

CHOICE IN WORKSPACE DETAILS: U.S. OFFICE WORKERS TREND

	Office Workers	
	1991	1989
Base	1008	1041
	%	%
Some choice	53	51
No choice	47	49
Not sure	*	-

---

*Less than 0.5%.

OW-Q.12a

Table 5-10

CHOICE IN WORKSPACE DETAILS: U.S. OFFICE WORKERS BY REGION, SIZE OF ORGANIZATION, AND TYPE OF ORGANIZATION

		Region				Size of Organization				Type of Organization			
	Total	East	South	Mid-west	West	100 or Less	101 to 500	501 to 5,000	Over 5,000	Manufactu-ring	Ser-vice	Non-Profit	Go-vern-ment
Base	1008	330	252	255	171	121	167	253	344	207	487	87	214
	%	%	%	%	%	%	%	%	%	%	%	%	%
Some choice	53	50	57	56	47	61	59	49	50	57	50	59	50
No choice	47	50	42	43	53	39	40	50	50	43	49	40	50
Not sure	*	-	*	1	-	-	1	*	-	*	*	1	-

---

*Less than 0.5%.

FM-Q.8a

Table 5-11

CHOICE IN WORKSPACE DETAILS: U.S. FACILITIES MANAGERS TREND

	Facilities Managers	
	1991	1989
Base	150	150
	%	%
Some choice	63	59
No choice	36	40
Not sure	1	1

ID-Q.7a

Table 5-12

CHOICE IN WORKSPACE DETAILS: U.S. INTERIOR DESIGNERS TREND

	Interior Designers	
	1991	1989
Base	150	150
	%	%
Practically all clients allow employees some choice	21	21
Only some	37	47
Practically none	41	31

OW-Q.9a, 9b
FM-Q.6a, 6b
ID-Q.5a, 5b

Table 5-13

FEATURES OF WORKSPACE: U.S. OFFICE WORKERS, FACILITIES MANAGERS, INTERIOR DESIGNERS

Base	Office Workers 1008			Facilities Managers For Their Employees 150			Interior Designers For Their Clients' Office Workers 150		
	Very Important %	Very True %	"Gap"	Very Important %	Very True %	"Gap"	Very Important %	Very True %	"Gap"
Proper lighting	92	64	-28	85	80	-5	83	44	-39
Comfortable heating and air conditioning where you work	82	44	-38	87	61	-26	85	39	-46
Enough worksurface space to display or spread out work	75	46	-29	67	49	-18	74	27	-47
A comfortable chair that can be adjusted to your needs	75	56	-19	71	56	-15	76	29	-47
Adequate storage and file space	62	39	-23	61	39	-22	55	29	-26
Enough privacy and quiet	60	30	-30	50	25	-25	55	16	-39
An office or work area close to people you work with on a regular basis	55	56	+1	51	46	-5	52	26	-26
Adequate meeting space in or near your office or workspace	54	50	-4	45	38	-7	42	23	-19

OW-Q.9a, 9b

Table 5-14

GAPS ON WORKSPACE FEATURES: U.S. OFFICE WORKERS BY REGION, USUAL WORKSPACE, HEAVY COMPUTER USE, AND TYPE OF ORGANIZATION

		Region				Usual Workspace				Type of Organization			
	Total	East	South	Midwest	West	Private	Partitioned	Open	Use Terminal or PC 5+ Hours/Day	Manufacturing	Service	Non-Profit	Government
Proper lighting	-28	-32	-23	-25	-34	-21	-32	-34	-34	-26	-26	-23	-36
Comfortable heating and air conditioning where you work	-38	-42	-28	-43	-36	-29	-52	-35	-48	-30	-37	-29	-50
Enough work-surface space to display or spread out work	-29	-30	-28	-30	-29	-19	-39	-33	-38	-33	-28	-22	-32
A comfortable chair that can be adjusted to your needs	-19	-17	-20	-22	-15	-13	-22	-23	-26	-19	-18	-13	-22
Adequate storage and file space	-23	-21	-24	-26	-19	-21	-27	-18	-25	-23	-22	-20	-27
Enough privacy and quiet	-30	-32	-28	-33	-27	-19	-41	-32	-32	-35	-27	-38	-31
An office or work area close to people you work with on a regular basis	+1	-3	+2	+1	+4	+2	-4	+2	-1	-3	+3	+7	-5
Adequate meeting space in or near your office or workupace	-4	-1	-1	-10	-8	-6	-8	-	-4	-2	-3	-7	-11

OW-Q.14

Table 5-15

COMMON FACILITIES OFFERED AT ORGANIZATIONS: U.S. OFFICE WORKERS BY SIZE OF ORGANIZATION AND TYPE OF ORGANIZATION

		Size of Organization				Type of Organization			
	Total	100 or Less	101-500	501-5000	Over 5000	Manufacturing	Service	Non-Profit	Government
Base	1008	121	167	253	344	207	487	87	214
	%	%	%	%	%	%	%	%	%
Organization's Facilities Include:									
Areas specifically set aside for training	58	36	47	56	71	57	58	56	61
Rooms or other areas set aside for on-going work on specific projects	57	53	58	57	57	61	57	52	53
Areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally	51	41	49	49	53	46	50	61	53
Areas set aside for child care	7	2	4	8	8	3	4	11	13

OW-Q.14

Table 5-16

COMMON FACILITIES OFFERED AT ORGANIZATIONS: U.S. OFFICE WORKERS TREND

	Office Workers	
	1991	1989
Base	1008	1041
	%	%
Areas specifically set aside for training	58	57
Rooms or other areas set aside for on-going work on specific projects	57	57
Areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally	51	46
Areas set aside for child care	7	8

FM-Q.10

Table 5-17

COMMON FACILITIES OFFERED AT ORGANIZATIONS: U.S. FACILITIES MANAGERS TREND

	Facilities Managers	
	1991	1989
Base	150	150
	%	%
Organization's Facilities Include:		
Areas specifically set aside for training	73	68
Rooms or other areas set aside for on-going work on specific projects	57	62
Areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally	56	50
Areas set aside for child care	12	7

CEO-Q.12, 13, 14a, 14b
FM-Q.11, 12a, 12b

Table 5-18

FACILITIES MANAGEMENT: U.S. TOP EXECUTIVES TREND, FACILITIES MANAGERS

	Top Executives			Facilities Managers On What Top Management Thinks
	1991	1989	1988	1991
Base	150	150	150	150
	%	%	%	%
Have full-time facilities management	63	57	55	X
Have part-time facilities management	27	33	41	X
View Facilities Design and Management:				
More as expense	25	35	NA	48
More as asset management	71	63	NA	47
Facilities Plans should be Linked to Business Plan:				
A great deal	61	NA	62	69
Somewhat	33	NA	36	28
Not very much	3	NA	2	1
Not at all	1	NA	-	1
Facilities Plans are Linked to Business Plan:				
A great deal	43	NA	28	29
Somewhat	35	NA	52	58
Not very much	18	NA	17	9
Not at all	2	NA	2	3

ID-Q.9, 10, 11a, 11b

Table 5-19

FACILITIES MANAGEMENT: U.S. INTERIOR DESIGNERS TREND

	Interior Designers	
	1991	1989
Base	150	150
	%	%
Work with Facilities Department in Client Organizations:		
Frequently	61	63
Sometimes	27	29
Almost never	11	8
Senior Management in Client Organizations Views Facilities Management:		
More as expense	42	55
More as asset management	53	42
Facilities Plans Should Be Linked to Business Plan:		
A great deal	70	X
Somewhat	27	X
Not very much	1	X
Not at all	1	X
Facilities Plans Are Linked to Business Plans in Most Client Organizations:		
A great deal	17	X
Somewhat	57	X
Not very much	21	X
Not at all	2	X

CEO-Q.15a, 15b

Table 5-20

USE OF OUTSIDE DESIGN PROFESSIONALS: U.S. TOP EXECUTIVES TREND

	Top Executives		
	1991	1989	1988
Base	150	150	105
	%	%	%
Organization routinely engages outside professionals	65	59	44
Does not routinely engage	34	40	52
(Base: Routinely Engages)	(97)	(88)	
	%	%	
Satisfaction with Outside Design Professionals:			
Very satisfied	51	42	NA
Somewhat satisfied	39	47	NA
Somewhat dissatisfied	5	8	NA
Very dissatisfied	-	-	NA

FM-Q.13a, 13c, 13e

Table 5-21

USE OF OUTSIDE DESIGN PROFESSIONALS:
U.S. FACILITIES MANAGERS TREND

	Facilities Managers		
	1991	1989	1988
Base	150	150	150
	%	%	%
Organization routinely engages outside professionals	68	61	38
Does not routinely engage	32	38	62
(Base: Routinely Engages)	(102)	(92)	
	%	%	
Design Professionals Influence Furniture/Equipment Standards:			
To a great extent	23	NA	NA
Somewhat	32	NA	NA
Not too much	32	NA	NA
Not at all	13	NA	NA
Satisfaction with Outside Design Professionals:			
Very satisfied	38	38	NA
Somewhat satisfied	49	52	NA
Somewhat dissatisfied	11	8	NA
Very dissatisfied	1	-	NA

CEO-Q.16a
FM-Q.14a; ID-Q.12a

Table 5-22

ANTICIPATED IMPACT ON FACILITIES DESIGN: U.S. TOP EXECUTIVES, FACILITIES MANAGERS, INTERIOR DESIGNERS

"A Great Deal of Impact"

	Top Executives	Facilities Managers	Interior Designers
Base	150	150	150
	%	%	%
Telecommunications and computer needs	71	71	92
The need to attract and retain skilled employees	55	55	63
Space costs	53	49	77
Health and safety legislation and regulation	49	49	47
The need to utilize existing furniture rather than purchase new furniture	48	43	48
An increasingly participative work environment	43	37	33
Costs for office furniture and equipment	39	28	61
Office worker involvement in the design of the work environment	21	17	15
Worker desire for privacy	18	13	17

CEO-Q.16a; FM-Q.14a;
ID-Q.12a

Table 5-23

ANTICIPATED IMPACT ON FACILITIES DESIGN: U.S. TREND

"A Great Deal of Impact"

	Top Executives		Facilities Managers		Interior Designers	
	1991	1989	1991	1989	1991	1989
Base	150	150	150	150	150	150
	%	%	%	%	%	%
Telecommunications and computer needs	71	77	71	75	92	87
Space costs	53	61	49	50	77	69
Health and safety legislation and regulation	49	44	49	39	47	31
Costs for office furniture and equipment	39	29	28	27	61	41
Worker desire for privacy	18	18	13	18	17	25

6: HIGHLIGHTS OF THE RESULTS FROM CANADA

How Office Workers Feel About Their Work

This year's OEI records a downturn in mood among office workers in Canada which, some contrary evidence notwithstanding, may be a sign of recession.

The proportion of Canadian office workers who believe the quality of working life in their country has improved compared to what it was ten years ago has dropped a precipitous 10 percentage points since 1989, from 57% to 47%, while the proportion who say it has gotten worse has climbed from 18% to 29%. As is seen in the U.S., executives and professionals take a much more sanguine view of things than office workers, with 73% of top executives (albeit down from 87% two years ago), 76% of facilities managers, and 71% of designers of the view that the quality of working life has improved (Table 6-1).

Unlike their U.S. counterparts, however, Canadian office workers are no less likely to see "a great deal of connection" between doing their jobs well and getting the things they want out of life this year (53%) than they were in 1989 (52%) or 1988 (51%), although all of these readings are down somewhat since 1986 (58%). Top executives in Canada, as in the U.S., consistently underestimate the degree to which their office workers find a linkage between their job and the happiness they get out of life (Table 6-2).

As in the U.S., office workers' reported job satisfaction has held steady since 1989, showing only an insignificant dip from 45% "very satisfied" two years ago to 39% today. As in the U.S., top executives, facilities managers, and interior designers underestimate the degree to which office workers derive satisfaction from their jobs, with 22% and 15%, respectively, of the two executive groups believing that most of their organization's office employees are "very satisfied" and 13% of designers believing that most office workers overall are "very satisfied" (Table 6-3).

As in the U.S., there are signs that a handful of specific office characteristics are less important to Canadian office workers today than they were two years ago. On two of the characteristics, this dropoff in importance suggests a lowering of expectations associated with a recessionary economy (Table 6-4):

-- The proportion who deem advancement opportunities "very important" has slipped from 59% in 1989 to 51% today.

-- Being encouraged to take risks was considered "very important" by 37% of Canadian office workers the last time the item was asked in 1988, but has dropped back to 30% today (the level reported in 1986).

On the other hand:

-- Job security has dropped in importance to Canada's office workers, from 77% "very important" in 1989 to 68% today.

The "gap" between the proportion of office workers who view the characteristic as "very important" and the proportion who say it's "very true" of their workplace appears to have widened slightly since two years ago on management honesty and ethics (from -46 to -51 percentage points), having a challenging job (from -12 to -19 points), and being able to contribute significantly (from -11 to -15 points). Interestingly, it appears to have narrowed on job security (from -26 to -20 points) and employee benefits (from -8 to -1 point) (Table 6-5).

Table 6-6 arrays the full set of sixteen characteristics tested this year for office workers, top executives, facilities managers, and interior designers. On all but two characteristics, the gap shown for Canadian office workers is virtually as wide, or even wider, than the gap shown for their U.S.

counterparts. (The exceptions are management providing clear goals and direction and, not surprisingly given national health insurance in Canada, employee benefits.) On many of the characteristics, Canadian top executives are more accurate than their U.S. counterparts in assessing the extent to which office workers' aspirations are unfulfilled; although from the office worker perspective many key characteristics still need fixing, the findings suggest that Canadian top management is closer to understanding the mindset of office workers than is U.S. top management. Top executives are *farthest* from understanding office workers on *management providing the tools and resources to get the job done*, *management honesty and ethics*, *management recognition of the need to support the natural environment*, *being able to make a significant contribution to their organization*, and *good pay*. Canada's facilities managers are least accurate in assessing the office worker viewpoint on *management providing tools and resources*, *management honesty and ethics*, *management providing clear goals and direction*, *management recognition of the need to support the natural environment*, *management sensitivity to the need to balance job and family responsibilities*, *encouragement of employees to participate in problem-solving*, and *good pay*. Interior designers fall short of recognizing the gap for office workers on *pride in the quality of products and services the organization provides*, *management recognition of the need to protect the natural environment* (although they come closer than top executives or facilities managers on this), *encouragement of teamwork*, and *encouragement of risk-taking*, while they dramatically *overestimate* the office workers' gap on *job security*, *benefits*, and *management recognition of employee contributions*.

As Table 6-7 shows, neither office workers nor top executives in Canada are more likely today than in 1989 to report a loss of white collar jobs in their organization.

How Office Workers Work

The Participative Workplace

In Canada, as in the U.S., aspiration gaps as reported by office workers on some "participation" characteristics are still relatively wide; While the gap is as narrow as 15 percentage points on being able to make a contribution to the organization, it widens to 36 points on receiving recognition for those contributions and to 29 points on being encouraged by management to participate in problem-solving. Perhaps more important is the fact that on those "participation" items also asked two years ago, there are no narrowing gaps -- that is, there is no evidence that the Canadian office workers see their workplace as becoming more participative.

A thin 41% plurality report that on their job they "identify problems or goals, and get them solved or achieved; almost as many say they're "given a problem to solve or a goal to achieve and [they] figure out what to do and how to do it; and only 7% say they're "pretty much told what to do and how to do it" (Table 6-8). Asked which of those degrees of initiative they would prefer, nearly half (49%) would opt for the independent approach, two in five (39%) would like to be assigned their goals but figure out how to achieve those goals themselves, while almost none would want to be told what to do (3%).

Although management encouragement of teamwork does not top the list of office workers' priorities for the workplace, a 59% majority deem this "very important, while a lower 45% report this is "very true" on their job. Canada's office workers report spending a mean of 19% of their time working on formal teams, compared with a slightly higher 23% working informally with others and a mean of 58% of their time working alone (Table 6-9).

Total Quality Management

Substantial majorities of Canadian office workers report their organization has implemented four out of five key elements of total quality management tested in this year's OEI, while even larger majorities say they favor each of the five initiatives (Table 6-10). Majorities of Canada's top executives report their organizations have initiated three of the five initiatives, and again larger majorities favor each of the five initiatives (Table 6-11). The notion of "continuous improvement," the "do-it-right-the-first-time" philosophy, and measurements of internal and external customer satisfaction seem to have pervaded the Canadian office workplace. Only a minority of office workers and top executives report implementation of incentive compensation for quality of work, and only a minority of top executives report they measure office workers' productivity.

Productivity

In Canada, the proportion of office workers reporting they feel "pushed to the wall" on productivity (i.e., certainly doing as much as they reasonably can) shot up from 1988 to 1989, but has stayed at the same level -- 58% -- since two years ago. But interestingly the proportion who say they are probably doing as much as they can has gone down from 23% in 1989 to 18% this year, while the proportion who say they could probably do more has risen from 18% to 23% (Table 6-12). As in the U.S., top executives chronically underestimate the extent to which office workers feel "pushed to the wall."

Canadian office workers, just like their U.S. counterparts, report a median of 40 hours per week spent at work -- which 22% consider too much, 5% too little, and 71% just about right.

Computer Use

Fully 88% of Canadian office workers -- about the same level as in the U.S. -- report they use a personal computer or terminal in their work (Table 6-13). Computer use rose from 64% to 71% between 1986 and 1988 and has now again risen dramatically from 72% in 1989 to 88% today. A 27% minority report they work at a computer five or more hours a day.

The proportion of top executives who have a computer terminal or personal computer in their office also rose from 45% in 1988 to 50% in 1989, and is now dramatically up to 64% this year (Table 6-14).

Work and the Family

In Canada, as in the U.S., office workers show a substantial aspiration gap on management sensitivity to the need to balance job and family responsibilities.

In Canada, nearly two in five office workers -- 39% -- report there are children under twelve years of age in their household. The subpopulation of those with children shows the same gender breakdown as Canadian office workers overall, but those with children in the household are disproportionately likely to think of themselves as managers (nearly half of those with children). As in the U.S., those with children in the household are more likely than office workers overall to be in the 30-39 age group (60% vs. 38%) and in Canada are much less likely to be 18-29 (11% vs. 26% overall). Not surprisingly, the overwhelming majority of those with young children in their household are married or living with a partner (89% vs. 63% overall), but married office workers with children are just as likely as married office workers overall to report that their spouse or partner is employed full-time (81% vs. 79%) or part-time (6% vs. 8%) and no more likely to say their spouse is unemployed or not employed and not looking for work (Table 6-15). In all, fully 72% of office workers with children in the household report they are married or living with a partner and that their spouse or partner is employed full-time, and another 6% say their spouse is employed part-time (Table 6-16). Only 8% of those who are married and have young children in their household say their spouse is not employed but not looking for work (i.e., that they are a full-time homemaker caring for the children), and virtually no one (1%) reports that their spouse is unemployed. As for those who are not married: it may be assumed that some proportion of those office workers with children under twelve in the household and who report they are divorced, separated, or widowed (5%) or single and never married (6%) are the parents of those children. So it is likely that almost four in five office workers with children under twelve in the household (or about three in ten office workers overall) need to make child care arrangements of some kind.

As in the U.S., flexible hours and flexible benefits are the two innovative arrangements to which office workers attach the highest priority (54% and 53%, respectively, say they are "very important"), with financial support or facilities for child care of middling importance (35%) and smaller proportions deeming arrangements for working at home (22%), job-sharing (19%) and part-time work (16%) "very important" (Table 6-17). However, substantial proportions of office workers report their employer offers flexible benefits and hours; in fact, the only real "gap" between what office workers feel is important and what is available to them is on financial support or facilities for child care (35% say this is "very important," while only 17% say their employer provides it). Not surprisingly, child care support is more important for office workers with children under twelve, although not more likely to be available through their employer -- so there is a wider gap (44% vs. 16%) on this arrangement. In addition, office workers with children are more likely to deem job-sharing arrangements important than to report such arrangements are available to them (24% vs. 16%). As is true for office workers overall, substantial proportions of those with children in the household assert that flexible hours and flexible benefits are available to them; those with children show no more appetite for working at home or working part-time than do office workers overall (Table 6-18).

Environmental, Health, and Safety Issues

In Canada as in the U.S., the natural environment is a high priority for office workers thinking about their workplace, but one which they feel is not getting enough attention from management (72% say management recognition and support of the need to protect the natural environment is a "very important" characteristic, while only 34% say it is "very true of their current job). In a specific example of how management can protect the environment, fully 74% of office workers in Canada report their organization has a program for recycling materials such as paper, while virtually all office workers (99%) would support such a program, as top executives correctly surmise (Tables 6-19, 6-20).

As in the U.S., the proportion of office workers who favor each of six health-related programs -- including programs for substance abuse, proactive health care, AIDS information, AIDS screening, and drug testing -- is considerably greater than the proportion who report that each has been implemented by their employer (Table 6-19). Fewer office workers in Canada than in the U.S. report drug testing and AIDS screening programs in their workplace, and fewer favor such programs. According to top executives' reports, a similar proportion of organizations in Canada and in the U.S. have substance abuse, proactive health, AIDS information, and AIDS screening programs (the latter having been implemented by mere handfuls of organizations in each country); many fewer organizations in Canada than in the U.S. have implemented drug testing either for new hires or current employees, with few Canadian executives guessing their employees would support the idea (Table 6-20).

Canadian office workers put eyestrain (48% think it is at least "somewhat serious") and air quality (46%) at the head of a list of hazards in the office workplace. The proportion who feel eyestrain is a serious risk has risen from 39% in 1989 to 48% today; the proportion who feel radiation from VDTs is a serious hazard has risen from 20% to 37%; and the proportion who feel hazardous materials in their building is of serious concern has risen from 9% to 17% in the past two years. The proportion who see air quality as a serious hazard has stayed about the same since 1989 (46%, up insignificantly from 42%), and repetitive strain injuries are deemed a serious risk by 19% (Table 6-21).

Those who spend five or more hours a day working at a computer terminal or PC are more likely than average to view eyestrain, potential harmful radiation from VDTs and repetitive strain injuries as serious hazards.

Top executives are somewhat less concerned than either office workers or facilities managers about eyestrain, air quality, harmful radiation from VDTs, and exposure to hazardous materials. Interior designers in Canada, like those in the U.S., show levels of concern about these hazards that are orders of magnitude higher than those of office workers or either of the two executive groups.

Facilities and Design Issues

Notwithstanding a trend away from open space arrangements, changes over the past several years in the kinds of workspace arrangements office workers in Canada report have not been dramatic; today, 34% report their usual workspace is a private office with a door, 40% say partitioned space, and 26% say open space with others, and the findings for facilities managers and interior designers do not contradict those of office workers (Table 6-22).

About the same proportion of Canadian office workers this year (58%) as in 1989 (60%) report that their "job entitles them to certain types of workspace, furniture, and accessories." The 1988 reading was somewhat higher (72%) (Table 6-23). Nearly three-quarters of Canadian office workers would favor a formal standards program. Just over half (55%) of Canadian facilities managers report their organization has a standards program, while 37% of interior designers assert that "practically all of their clients" have standards programs (Table 6-24). More Canadian office workers today than two years ago (52%, up from 45%) report they have "some choice" in their workspace details (Table 6-25).

Proper lighting (90% "very important"), comfortable heating and air conditioning (84%), a comfortable chair (82%), and sufficient worksurface space (77%) head the list of eight specific workspace features that Canadian office workers see as most important to their productivity (Table 6-26). Adequate file and storage space (67%), enough privacy and quiet (66%), proximity to colleagues office workers need to work with on a regular basis (60%), and adequate meeting space nearby (58%) are also deemed "very important" by majorities. The "gap" between the proportion of office workers deeming a feature "very important" and the proportion saying it is "very true" of their workspace is widest on comfortable heating and air conditioning (-47 points) and is also substantial on privacy (-35), sufficient worksurface space (-29), and lighting (-28). With only a handful of exceptions, facilities managers show a reasonably good understanding of office workers' priorities and unfulfilled needs regarding these features; they underestimate the "gap" shown for office workers on privacy and quiet but overestimate it on proximity to work colleagues. Interior designers, who take a dour view of the prevalence of specific features in the Canadian office workplace, overestimate the "gap" on most features.

Although not conclusive, the findings suggest an increase over the past two years in the number of Canadian office workers in office facilities with informal meeting areas (other than the cafeteria or conference rooms) and areas set aside for child care. About one-half report they now have informal meeting areas (52%) and specific project areas (50%) in their facilities, while fewer report training areas (44%) and very few report child care areas (13%) (Table 6-27).

The proportion of Canadian top executives who report their organization has a full-time facilities management function has soared over the past two years, from 36% in 1989 to 60% today, similar to the U.S. level (Table 6-28). Nearly three in five (57%) continue to view facilities design and management more as asset management than as an expense. As in the U.S., the majority of top executives (65%) believe that facilities plans should be linked to the business plan "a great deal," but only a minority (35%) assert this is true "a great deal."

The proportion of Canadian top executives who report their organization regularly engages outside design professionals (55%) is unchanged since 1989, but those who engage them appear to be less satisfied (35% "very satisfied," down from 51% in 1989). However, the proportion of those at least "somewhat satisfied" with the design professionals they use has remained the same (86% this year, 85% in 1989) (Table 6-29). Among Canada's facilities managers, a somewhat higher 64% report their organizations regularly engage outside design professionals; 43% of that group express the highest satisfaction, with virtually all at least "somewhat satisfied." While only 18%

of facilities managers whose organizations engage outside designers say those professionals influence their furniture and equipment standards and their selection of manufacturers "a great deal," 62% say the designers influence them at least "somewhat." Of those whose organizations regularly engage outside designers, 51% say the designers have recently been used for architectural or interior design, 29% for ongoing facilities management, 15% for consultation, 13% for installation or project management, and 10% for major construction or renovation.

Among top executives in Canada, telecommunications and computer needs far and away head a list of factors expected to have "a great deal of impact" on facilities design in the next five years (76%). Running a distant second is health and safety legislation and regulation (53%), which in the view of top executives is becoming much more important an issue than they would have thought just two years ago (when a lower 39% felt this would have "a great deal of impact"). Space costs come in at about the same level (49%, up from 41% two years ago), followed by the need to utilize existing furniture (43%), an increasingly participative work environment (42%), the need to attract and retain skilled employees (42%), and furniture and equipment costs (36%, up from 21% two years ago). Fewer think office worker involvement in the design of the work environment (26%) or worker desire for privacy (18%) will have much impact (Table 6-30). The views of facilities managers track closely with those of top executives; while agreeing with the two executive groups on the importance of telecommunications and computer needs, designers put somewhat more emphasis on space costs and furniture and equipment costs and less emphasis on health and safety regulation.

Observation:

Compared with the EEC and Japan, North America as a whole takes a clear lead on the office environment. But Canada may be "kinder and gentler" than the U.S.

To be sure, office workers in the two North American nations do not differ significantly in their sense of the overall quality of working life, their job satisfaction, or their sense of linkage between doing their job well and getting what they want out of life. And overall, they show similar "aspiration gaps" between what they consider important and what they feel is true about their job and workplace.

As in the U.S., there is evidence of a recessionary mindset among Canadian office workers -- for example, a marked drop since 1989 in the proportion who believe the quality of working life has improved in the past ten years. But the conclusion that Canadian office workers are beset by recession fears -- as seems true of their U.S. counterparts -- is contested by other findings such as a narrowing of the aspiration gap on job security, and no increase in reported white collar layoffs since 1989. Indeed, there are some differences between office workers in the two countries that might help explain this. Canadian office workers tend to be in smaller organizations than their U.S. counterparts (50% of Canadian office workers compared to 60% in the U.S. work for organizations with over 500 employees nationwide), while in both countries downsizing is more frequently reported in larger organizations than in smaller ones. Moreover, Canadian office workers are far more likely than those in the U.S. to be union members (29% in Canada vs. 14% in the U.S.).

Overall, Canadian top executives seem to have a better understanding than do their U.S. counterparts of the frustrations that beset office workers, and may convey more strongly the sense that the rank-and-file's problems are taken into consideration at the highest levels of management.

OW-Q.1a; CEO-Q.1a

Table 6-1

QUALITY OF WORKING LIFE COMPARED TO TEN YEARS AGO: CANADA OFFICE WORKERS AND EXECUTIVES TREND

	Office Workers		Top Executives		Facilities Managers	Interior Designers
	1991	1989	1991	1989	1991	1991
Base	250	250	100	101	107	101
	%	%	%	%	%	%
Improved	47	57	73	87	76	71
Gotten worse	29	18	12	4	10	14
Stayed the same	19	19	10	9	14	14
Not sure	4	6	5	-	-	1

OW-Q.1b; CEO-Q.1b

Table 6-2

CONNECTION BETWEEN DOING JOB WELL AND GETTING WHAT YOU WANT OUT OF LIFE: CANADA OFFICE WORKERS AND EXECUTIVES TREND

	Office Workers				Top Executives Answering About Their Employees	
	1991	1989	1988	1986	1991	1989
Base	250	250	250	250	100	101
	%	%	%	%	%	%
Great deal	53	52	51	58	30	36
Only some	32	35	35	27	60	59
Hardly at all	14	12	12	12	7	3
Not sure	-	1	2	3	3	-

OW-Q.3a; CEO-Q.3a;
FM-Q.3a; ID-Q.3a

Table 6-3

OFFICE WORKERS' JOB SATISFACTION: CANADA OFFICE WORKERS AND EXECUTIVES TREND

	Office Workers Answering for Themselves				Top Executives Answering About Their Employees			Facilities Managers Answering About Their Employees	Interior Designers Answering About Most Office Employees
	1991	1989	1988	1986	1991	1989	1988		
Base	250	250	250	250	100	101	112	107	101
	%	%	%	%	%	%	%	%	%
Very satisfied	39	45	42	42	22	23	21	15	13
Somewhat satisfied	45	40	45	47	66	68	74	73	71
Somewhat dissatisfied	14	9	10	8	12	9	4	11	11
Very dissatisfied	3	6	3	3	-	-	-	1	-

OW-Q.2a, 2b, 2c, 2d

Table 6-4

IMPORTANCE AND PREVALENCE OF OFFICE CHARACTERISTICS: CANADA OFFICE WORKERS TREND

	Very Important				Very True			
	1991	1989	1988	1986	1991	1989	1988	1986
Base: 1991, 250; 1989, 250; 1988, 250; 1986, 250	%	%	%	%	%	%	%	%
Management is honest, upright, ethical	87	82	90	NA	36	36	41	NA
I'm proud of the quality of products and services this organization provides	82	NA	78	NA	62	NA	59	NA
My job is challenging	78	80	89	80	59	68	60	69
Top management provides clear goals and directions for the organization	76	75	NA	NA	32	28	NA	NA
Management recognizes my contributions	75	77	NA	NA	39	42	NA	NA
I can contribute significantly to my company	70	74	73	68	55	63	52	54
The employee benefits are good	68	68	77	71	67	60	66	67
My job is secure from layoffs	68	77	78	NA	48	51	47	NA
The pay is good	63	65	65	66	40	47	42	43
There are ample opportunities for me to move to a better position in my company	51	59	64	59	25	35	31	36
I'm encouraged to take risks	30	NA	37	30	18	NA	22	27

OW-Q.2a, 2b, 2c, 2d

Table 6-5

OFFICE CHARACTERISTICS ASPIRATION GAPS: CANADA OFFICE WORKERS TREND

-- Percentage Points --

	Office Workers			
	1991	1989	1988	1986
Management is honest, upright, and ethical in its dealings with employees and the community at large	-51	-46	-49	NA
Top management provides clear goals and direction for the organization	-44	-47	NA	NA
Management recognizes my contributions	-36	-35	NA	NA
There are ample opportunities for me to move up to a better position in my company	-26	-24	-33	-23
The pay is good	-23	-24	-26	-32
My job is secure from layoffs	-20	-26	-31	NA
I'm proud of the quality of the products and services this organization provides	-20	NA	-19	NA
My job is challenging	-19	-12	-29	-11
I can contribute significantly to my company	-15	-11	-21	-14
I'm encouraged to take risks	-12	NA	-15	-3
The employee benefits -- such as insurance and vacation -- are good	-1	-8	-11	-4

OW-Q.2a, 2b, 2c, 2d; CEO-Q.2a, 2b, 2c, 2d
FM-Q.2a, 2b, 2c, 2d; ID-Q.2a, 2b, 2c, 2d

Table 6-6

OFFICE CHARACTERISTICS: IMPORTANCE AND PREVALENCE: CANADA OFFICE WORKERS AND EXECUTIVES

	Office Workers		Top Executives		Facilities Managers		Interior Designers	
Base	250		100		107		101	
	Very Important to Them	Very True on Their Present Job	Very Important For Their Employees	Very True For Their Employees	Very Important For Their Employees	Very True For Their Employees	Very Important For Most Office Workers	Very True For Most Office Workers
	%	%	%	%	%	%	%	%
Management is honest, upright, and ethical in its dealing with employees and the community at large	87	36	88	70	83	60	73	31
Management provides me with the tools and resources to get my job done	85	46	84	59	75	50	76	40
I'm proud of the quality of the products and services this organization provides	82	62	70	56	73	60	52	43
My job is challenging	78	59	58	42	59	45	45	19
Top management provides clear goals and direction for the organization	76	32	74	34	67	37	60	18

(Continued)

OW-Q.2a, 2b, 2c, 2d; CEO-Q.2a, 2b, 2c, 2d
FM-Q.2a, 2b, 2c, 2d; ID-Q.2a, 2b, 2c, 2d

Table 6-6 (Continued)

OFFICE CHARACTERISTICS: IMPORTANCE AND
PREVALENCE: CANADA OFFICE WORKERS AND EXECUTIVES

	Office Workers		Top Executives		Facilities Managers		Interior Designers	
Base	250		100		107		101	
	Very Important to Them	Very True on Their Present Job	Very Important For Their Employees	Very True For Their Employees	Very Important For Their Employees	Very True For Their Employees	Very Important For Most Office Workers	Very True For Most Office Workers
	%	%	%	%	%	%	%	%
Management recognizes my contributions	75	39	80	38	73	44	75	27
Management recognizes and supports the need to protect the natural environment	72	34	52	42	62	51	39	19
I can contribute significantly to my company	70	55	43	40	53	43	42	26
The employee benefits -- such as insurance and vacation -- are good	68	67	64	61	65	62	64	47
My job is secure from layoffs	68	48	85	61	83	53	77	23

(Continued)

OW-Q.2a, 2b, 2c, 2d; CEO-Q.2a, 2b, 2c, 2d
FM-Q.2a, 2b, 2c, 2d; ID-Q.2a, 2b, 2c, 2d

Table 6-6 (Continued)

OFFICE CHARACTERISTICS: IMPORTANCE AND PREVALENCE: CANADA OFFICE WORKERS AND EXECUTIVES

	Office Workers		Top Executives		Facilities Managers		Interior Designers	
Base	250		100		107		101	
	Very Important to Them	Very True on Their Present Job	Very Important For Their Employees	Very True For Their Employees	Very Important For Their Employees	Very True For Their Employees	Very Important For Most Office Workers	Very True For Most Office Workers
	%	%	%	%	%	%	%	%
Management is sensitive to the need to balance job and family responsibilities	66	30	72	34	59	33	51	12
The pay is good	63	40	65	50	64	50	60	36
Employees at all levels are encouraged to participate in problem-solving	62	33	58	29	52	35	45	14
Employees at all levels are encouraged to work in teams	59	45	37	28	42	36	31	28
There are ample opportunities for me to move up to a better position in my company	51	25	49	28	51	24	52	26
I'm encouraged to take risks	30	18	22	13	19	14	12	9

OW-Q.3c; CEO-Q.4a

Table 6-7

RESTRUCTURING: CANADA OFFICE WORKERS AND TOP EXECUTIVES TREND

	Office Workers		Top Executives	
	1991	1989	1991	1989
Base	250	250	100	101
	%	%	%	%
Reorganized, changing senior management and how the organization is run in a major way	48	45	65	45
Eliminated "white collar" jobs	22	26	26	30
Bought another company	18	15	26	25
Merged with another company	10	10	7	6
Been bought by another company	5	7	5	9

OW-Q.16a, 16b

Table 6-8

DEGREE OF INITIATIVE: CANADA OFFICE WORKERS

	Total	
Base	250	
	Best Describes %	Prefer %
You're pretty much told what to do and how to do it	7	3
You're given a problem to solve or a goal to achieve, and you figure out what to do and how to do it	37	39
You identify problems or goals, and get them solved or achieved	41	49
Combination	15	8
Not sure	-	1

Q.17

Table 6-9

PROPORTION OF WORK WEEK SPENT WORKING ALONE, INFORMALLY WITH OTHERS, AND ON FORMAL TEAMS: CANADA OFFICE WORKERS

	Total
Base	250
Mean % of Time:	
Working alone	58
Working informally with others	23
Working on formal teams	19

OW-Q.4, 5

Table 6-10

TQM INITIATIVES: CANADA OFFICE WORKERS

	Total	
Base	250	
	Does %	Favor %
Foster the notion of "continuous improvement" of the work and the way things are done in the office	80	93
Measure the satisfaction of your office's customers or clients, either external or within the organization	68	88
Have a "do-it-right-the-first-time" philosophy for office work	62	78
Measure office worker productivity	62	75
Offer its office workers incentive compensation linked to the quality of their work	31	78
Offer its office workers incentive compensation linked to the quantity of their work	27	60

CEO-Q.5a, 5b

Table 6-11

TQM INITIATIVES: CANADA TOP EXECUTIVES

	Top Executives	
	100	
Base	Organization Does	Would Favor
	%	%
Foster the notion of "continuous improvement" of the work and the way things are done in the office	87	99
Measure the satisfaction of your office's customers or clients, either external or within the organization	74	96
Have an "do-it-right-the first time" philosophy for office work	63	85
Measure office worker productivity	27	73
Offer its office workers incentive compensation linked to the quality of their work	22	72
Offer its office workers incentive compensation linked to the quantity of their work	17	50

OW-Q.3b; CEO-Q.3b

Table 6-12

PRODUCTIVITY: WHETHER OFFICE WORKERS DO AS MUCH AS THEY CAN: CANADA OFFICE WORKERS AND TOP EXECUTIVES TREND

	Office Workers Answering for Themselves				Top Executives Answering About Their Employees		
	1991	1989	1988	1986	1991	1989	1988
Base	250	250	250	250	100	101	112
	%	%	%	%	%	%	%
Certainly do as much as can	58	58	53	51	39	37	38
Probably do as much as can	18	23	23	24	39	42	37
Could probably do more	23	18	23	25	22	22	26
Not sure	1	1	*	-	-	-	-

---

*Less than 0.5%.

OW-Q.15a, 15b

Table 6-13

USE OF TERMINALS AND PCs: CANADA
OFFICE WORKERS

	Office Workers			
	1991	1989	1988	1986
Base	250	250	250	250
	%	%	%	%
Total Use Terminal or PC	88	72	71	64
Use PC	29	30	26	X
Use terminal	31	28	24	X
Use both	28	16	21	X
Don't use	12	26	28	X
Use 5+ hours	27	24	24	X
Median hours use average week	3	3	3	3

CEO-Q.F5

Table 6-14

USE OF TERMINALS AND PCs: CANADA
TOP EXECUTIVES

	Top Executives		
	1991	1989	1988
Base	100	101	112
	%	%	%
Total Have Terminal or PC	64	50	45
Have terminal	21	18	18
Have PC	22	15	17
Have both	21	18	10
Don't have	36	48	55

OW-Q.F10

Table 6-15

PROFILE OF CANADIAN OFFICE WORKERS WITH CHILDREN UNDER 12 IN HOUSEHOLD (39% OF TOTAL)

	Total Canadian Office Workers	Canadian Office Workers With Children Under 12 In Household
Base	250	94
	%	%
Sex		
Male	52	52
Female	48	48
Age		
18-29	26	11
30-39	38	60
40-49	25	25
50+	10	3
Job Level		
Managerial	38	48
Non-managerial	62	52
Marital Status		
Married/living with partner	63	89
Divorced/separated/widowed	9	5
Single/never married	28	6
Employment Status of Spouse (Base: Married)	(151)	(83)
	%	%
Employed full-time	79	81
Employed part-time	8	6
Unemployed	4	3
Not employed but not looking for work	7	9
Retired	2	-

OW-Q.F9a, F9b, F10

Table 6-16

MARITAL STATUS OF CANADIAN OFFICE WORKERS WITH CHILDREN UNDER 12 IN HOUSEHOLD

	Have Children Under 12 in Household
Base	94
	%
Divorced/separated/widowed	5
Single/never married	6
Married, spouse employed full-time	72
Married, spouse employed part-time	6
Married, spouse unemployed	1
Married, spouse not employed but not looking for work	8

OW-Q.6a, 6b

Table 6-17

IMPORTANCE AND PREVALENCE OF FLEXIBLE WORK ARRANGEMENTS: CANADA OFFICE WORKERS

	Total		
	1991		1989
Base	250		250
	Very Important	Employer Offers	Employer Offers
	%	%	%
Flexible hours that you can tailor to meet your needs	54	58	X
Flexible benefits that you can tailor to meet your needs	53	49	X
Financial support or facilities for child care offered by your employer	35	17	X
The opportunity to spend a portion of normal office hours working at home rather than in your office	22	28	19
An arrangement in which you actually split hours for a job with someone else, sometimes known as job sharing	19	19	13
The opportunity to do a job like yours part-time	16	31	27

OW-Q.6a, 6b

Table 6-18

IMPORTANCE AND PREVALENCE OF FLEXIBLE WORK ARRANGEMENTS:
CANADA OFFICE WORKERS WITH CHILDREN IN HOUSEHOLD

Base: Children under 12 in household

	Office Workers	
Base	94	
	Very Important %	Employer Offers %
Flexible hours that you can tailor to meet your needs	60	59
Flexible benefits that you can tailor to meet your needs	58	53
Financial support or facilities for child care offered by your employer	44	16
The opportunity to spend a portion of normal office hours working at home rather than in your office	26	34
An arrangement in which you actually split hours for a job with someone else, sometimes known as job sharing	24	16
The opportunity to do a job like yours part-time	19	34

OW-Q.8a, 8b

Table 6-19

HEALTH AND SAFETY POLICIES: CANADA OFFICE WORKERS TREND

	Office Workers			
	Organization Does		Would Favor	
	1991	1989	1991	1989
Base	250	250	250	250
	%	%	%	%
Have a program for promoting good health habits	46	42	92	85
Have an alcohol or drug abuse program	39	42	90	85
Provide employees with information about the impact of AIDS in the workplace	29	29	78	76
Require pre-employment drug testing for new hires[1]	7	X	45	X
Require drug testing for current employees[1]	4	X	38	X
Screen prospective employees for AIDS	4	2	33	36
Have a recycling program	74	X	99	X

---

[1] In 1989, was worded "have mandatory drug testing for employees"; 3% said their organization did it, 34% that they would favor it.

CEO-Q.8a, 8b

Table 6-20

HEALTH AND SAFETY POLICIES: CANADA TOP EXECUTIVES

	Top Executives	
	100	
Base	Organization Does	Most Employees Would Favor
	%	%
Have an alcohol or drug abuse treatment program	67	96
Have a program for promoting good health habits	63	94
Provide employees with information about the impact of AIDS in the workplace	62	85
Require pre-employment drug testing for new hires	7	26
Require drug testing for current employees	5	17
Screen prospective employees for AIDS	2	26
Have a recycling program	88	99

OW-Q.7; CEO-Q.7;
FM-Q.5; ID-Q.4

Table 6-21

HAZARDS IN OFFICE WORKPLACE: CANADA OFFICE WORKERS AND EXECUTIVES TREND

("Very" or "Somewhat Serious")

	Canada					
	Office Workers		Top Executives		Facilities Managers	Interior Designers
	1991	1989	1991	1989	1991	1991
Base	250	250	100	101	107	101
	%	%	%	%	%	%
Eyestrain	48	39	32	33	40	85
The quality of the air you breathe	46	42	33	21	47	91
Potential harmful radiation from video display terminals	37	20	21	16	29	57
The risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard	19	X	18	X	28	50
Exposure to hazardous materials in your building[1]	17	9	7	8	21	64

---

[1] In 1989, the example, "... such as asbestos," was provided.

OW-Q.10; FM-Q.7a
ID-Q.6a

Table 6-22

USUAL WORKSPACE ARRANGEMENT: CANADA OFFICE WORKERS TREND, FACILITIES MANAGERS AND INTERIOR DESIGNERS

	Office Workers				Facilities Managers Mean % of Office Employees	Interior Designers Mean % of Facilities Designed
	1991	1989	1988	1986	1991	1991
Base	250	250	250	250	150	150
	%	%	%	%	%	%
Private	34	29	32	29	34	41
Partitioned	40	33	35	37	45	44
Open with others	26	36	31	34	20	15

---

*Less than 0.5%.

Q.12b, 12d

Table 6-23

STANDARDS PROGRAMS: CANADA OFFICE WORKERS TREND

	Office Workers		
	1991	1989	1988
Base	250	250	250
	%	%	%
Job entitles them to certain types of workspace, furniture, accessories	58	60	72
Favor formal program	73	NA	72

FM-Q.8b; ID-Q.7b

Table 6-24

STANDARDS PROGRAMS: CANADA FACILITIES MANAGERS AND INTERIOR DESIGNERS

	Facilities Managers
Base	107
	%
Organization has standards program	55
Does not have	37
In some locations but not others	7

	Interior Designers
Base	101
	%
Practically all clients have standards programs	37
Only some	47
Practically none	17

OW-Q.12a

Table 6-25

CHOICE IN WORKSPACE DETAILS: CANADA OFFICE WORKERS TREND

	Office Workers	
	1991	1989
Base	250	250
	%	%
Some choice	52	45
No choice	47	54
Not sure	1	1

OW-Q.9a, 9b
FM-Q.6a, 6b
ID-Q.5a, 5b

Table 6-26

FEATURES OF WORKSPACE: CANADA OFFICE WORKERS, FACILITIES MANAGERS, INTERIOR DESIGNERS

	Office Workers			Facilities Managers			Interior Designers		
Base	250			107			101		
	Very Impor-tant %	Very True %	"Gap"	Very Impor-tant %	Very True %	"Gap"	Very Impor-tant %	Very True %	"Gap"
Proper lighting	90	62	-28	90	62	-28	81	38	-43
Comfortable heating and air conditioning where you work	84	37	-47	82	42	-40	90	36	-54
A comfortable chair that can be adjusted to your needs	82	60	-22	82	59	-23	81	33	-48
Enough worksurface space to display or spread out work	77	48	-29	68	39	-29	73	27	-46
Adequate storage and file space	67	45	-22	58	36	-22	65	26	-39
Enough privacy and quiet	66	31	-35	54	32	-22	59	20	-39
An office or work area close to people you work with on a regular basis	60	60	-	53	39	-14	55	31	-24
Adequate meeting space in or near your office or workspace	58	52	-6	41	39	-2	39	19	-20

OW-Q.14; FM-Q.10

Table 6-27

COMMON FACILITIES OFFERED AT ORGANIZATIONS: CANADA OFFICE WORKERS TREND AND FACILITIES MANAGERS

	Office Workers		Facilities Managers
	1991	1989	1991
Base	250	250	107
	%	%	%
Areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally	52	47	55
Rooms or other areas set aside for on-going work on specific projects	50	48	56
Areas specifically set aside for training	44	45	71
Areas set aside for child care	13	8	19

CEO-Q.12, 13, 14a, 14b

Table 6-28

FACILITIES MANAGEMENT: CANADA TOP EXECUTIVES TREND

	Top Executives		
	1991	1989	1988
Base	100	101	112
	%	%	%
Have full-time facilities management	60	36	40
Have part-time facilities management	30	54	38
View Facilities Design and Management:			
More as expense	30	28	X
More as asset management	57	59	X
Facilities Plans Should be Linked to Business Plan:			
A great deal	65	NA	57
Somewhat	32	NA	36
Not very much	1	NA	6
Not at all	1	NA	-
Facilities Plans Are Linked to Business Plan:			
A great deal	35	NA	34
Somewhat	43	NA	45
Not very much	17	NA	17
Not at all	4	NA	2

CEO-Q.15a, 15b
FM-Q.13a, 13e

Table 6-29

USE OF OUTSIDE DESIGN PROFESSIONALS: CANADA TOP EXECUTIVES TREND, FACILITIES MANAGERS

	Top Executives			Facilities Managers
	1991	1989	1988	1991
Base	100	101	112	107
	%	%	%	%
Organization routinely engages outside professionals	55	58	47	64
Does not routinely engage	42	38	49	33
(Base: Routinely Engages)	(55)	(59)		
	%	%		
Satisfaction with Outside Design Professionals:				
Very satisfied	35	51	NA	43
Somewhat satisfied	51	34	NA	56
Somewhat dissatisfied	9	12	NA	-
Very dissatisfied	-	2	NA	-

CEO-Q.16a; FM-Q.14a
ID-Q.12a

Table 6-30

ANTICIPATED IMPACT ON FACILITIES DESIGN: CANADA TOP EXECUTIVES TREND, FACILITIES MANAGERS, INTERIOR DESIGNERS

("A Great Deal of Impact")

	Top Executives		Facilities Managers	Interior Designers
	1991	1989	1991	1991
	100	101	107	101
	%	%	%	%
Telecommunications and computer needs	76	72	79	86
Health and safety legislation and regulation	53	39	52	40
Space costs	49	41	54	69
The need to utilize existing furniture rather than purchase new furniture	43	X	45	42
An increasingly participative work environment	42	X	43	42
The need to attract and retain skilled employees	42	X	54	60
Costs for office furniture and equipment	36	21	36	54
Office worker involvement in the design of the work environment	26	X	27	23
Worker desire for privacy	18	15	19	18

APPENDIX A: METHODOLOGY

The Office Environment Index 1991 study in the U.S. and Canada was part of a worldwide research effort that also encompassed the twelve countries of the European Economic Community and Japan. Populations and leadership groups sampled in the U.S. and Canada include:

-- Office Workers in the U.S.: A sample of 1,008 full-time office workers in the U.S. was screened from a national cross-section of the entire U.S. adult population 18 years of age or older (not including Alaska and Hawaii). The cross-section was developed using a modified stratified random-digit dialing method. According to the criteria by which office workers were screened from the national sample of U.S. adults, an eligible office worker was at the time of the interview employed full-time in an office with at least 25 office workers at their branch or location and had worked in any office for at least six months. If random selection yielded two or more qualified office workers residing in one household, respondent selection was determined according to which potential respondent had the most recent birthday.

-- Office Workers in Canada: A smaller sample of 250 office workers in Canada was screened according to the same criteria from a national cross-section of adults.

-- Top Executives of Larger Organizations in the U.S.: A representative sample of 150 senior-level executives with appropriate areas of responsibility (e.g., CEOs, Vice President of Human Resources or Corporate Planning) was drawn from the Dun & Bradstreet listing of organizations employing 1,500 or more persons nationwide. The universe of organizations from which executives (one per organization) were sampled includes both publicly- and privately-held corporation, nonprofit institutions, and governmental entities.

-- Top Executives of Larger Organizations in Canada: A representative sample of 100 top executives of organizations in Canada, with both executives and organizations defined as in the U.S., was drawn from the top 300 Canadian organizations by employee size, based on =Dun & Bradstreet listings.

-- Facilities Managers of Large Organizations in the U.S.: A representative sample of 150 facilities managers was drawn from the same sample frame (but not necessarily from the same organizations) as Top Executives (i.e., the Dun & Bradstreet listing of organizations with 1,500 or more employees nationwide). To qualify, facilities managers were defined as persons responsible for "the management of your organization's facilities including planning, design, and construction," with three or more years' experience with those responsibilities in any organization.

-- Facilities Managers of Large Organizations in Canada: A representative sample of 107 facilities managers was drawn from the same sample frame as the sample of Top Executives in Canada, and qualified by the same criteria as facilities managers in the U.S.

-- Contract Office Designers in the U.S. and Canada: Samples of 150 contract interior designers in the U.S. and 101 in Canada were drawn from listings compiled by Steelcase Inc. Qualifying designers affirmed that they "were one of the senior people in your firm responsible for contract interior design including programming, planning, and specifying architectural finishes and office furnishings" and that they had been doing that kind of work in any firm for at least five years.

All interviews were conducted by telephone, from January through April 1991. Interviews with office workers were an average of 25 minutes in duration; those with executives and professionals an average of 20 minutes.

After completion of interviewing, questionnaires were edited, coded, key entered, and tabulated by computer. During the tabulation phase, weights were applied to the samples of office workers to adjust the results according the number of qualifying adult office workers in each household.

Tables A-1 through A-8 profile the samples for the U.S. and Canada.

Table A-1

PROFILE OF U.S. OFFICE WORKERS

	Total
Base	1008
	%
Region	
East	33
South	24
Midwest	24
West	18
Sex	
Male	47
Female	53
Age	
18 to 20 years	1
21 to 24 years	7
25 to 29 years	14
30 to 34 years	14
35 to 39 years	16
40 to 49 years	29
50 to 64 years	17
65 and over	1
Median age	39

Income	Household	Personal
$7,500 or less	1	2
$7,501 to $15,000	2	9
$15,001 to $25,000	9	25
$25,001 to $35,000	15	21
$35,001 to $50,000	21	20
$50,001 to $75,000	25	11
$75,001 or more	23	6

Size of Organization	
100 or fewer employees	11
101 to 500	16
501 to 5,000	24
Over 5,000	36
Type of Organization	
Manufacturing	20
Services	49
Government	22
Nonprofit	8

(Continued)

Table A-1 (Continued)

PROFILE OF U.S. OFFICE WORKERS

	Total
Base	1008
	%
Years in Workforce	
10 or more years	81
5 to 9 years	14
2 to 4 years	5
1 year or less	*
Median years in workforce	18
Years at Present Employer	
10 or more years	41
5 to 9 years	22
2 to 4 years	23
1 year or less	14
Median years with present employer	7
Years at Present Job	
10 or more years	19
5 to 9 years	23
2 to 4 years	31
1 year or less	28
Median years on present job	3
Marital Status	
Married	65
Divorced/widowed/separated	13
Single	21
Self-Description of Position	
Managerial	39
Technical	32
Secretarial/clerical	26
Union member	14
Children in household	34

Table A-2

PROFILE OF U.S. TOP EXECUTIVES

	Total
Base	150
	%
Age	
18 to 24 years	2
25 to 29 years	3
30 to 34 years	8
35 to 39 years	18
40 to 49 years	33
50 to 64 years	33
65 and over	2
Median age	44
Median years in workforce	23
Median years at present organization	9
Median years at present position	4
Number of Employees Employed by Organization Nationwide	
Less than 2,000	31
2,000 to 2,999	21
3,000 to 4,999	15
5,000 to 6,999	7
7,000 to 9,999	6
10,000 or more	17
Median	2,667

Table A-3

PROFILE OF U.S. FACILITIES MANAGERS

	Total
Base	150
	%
Age	
18 to 24 years	1
25 to 29 years	5
30 to 34 years	7
35 to 39 years	15
40 to 49 years	33
50 to 64 years	33
65 and over	2
Median age	46
Median years in workforce	25
Median years at present organization	10
Median years at present position	5
Number of Employees Employed by Organization Nationwide	
Less than 2,000	42
2,000 to 2,999	16
3,000 to 4,999	16
5,000 to 6,999	7
7,000 to 9,999	9
10,000 or more	7
Median number of employees nationwide	2,120
Median percentage office workers	31%
Median average gross square feet per workstation	102 sq. ft.

Table A-4

PROFILE OF U.S. INTERIOR DESIGNERS

	Total
Base	150
	%
Age	
18 to 24 years	1
25 to 29 years	14
30 to 34 years	24
35 to 39 years	19
40 to 49 years	29
50 to 64 years	7
65 and over	-
Median age	36
Median years employed as office design professional	11
Median years employed by current firm	5
Median number of employees in firm	136
Median number of employees solely in contract office interior design	21
Median number of design projects in past three years, with 50+ workstations	10
Median square feet of average office interior project in 1990	49,333
Median average gross square feet per workstation, 1990 projects	99

Table A-5

PROFILE OF CANADIAN OFFICE WORKERS

	Total
Base	250 %
Province	
British Columbia	12
Alberta	9
Saskatchawan	4
Manitoba	4
Ontario	38
Quebec	25
Nova Scotia	3
New Brunswick	3
Newfoundland	2
Sex	
Male	52
Female	48
Age	
18 to 20 years	1
21 to 24 years	8
25 to 29 years	18
30 to 34 years	19
35 to 39 years	18
40 to 49 years	25
50 to 64 years	10
65 and over	*
Median age	35

Income (in Canadian $)	Household	Personal
$7,500 or less	*	1
$7,501 to $15,000	1	2
$15,001 to $25,000	5	18
$25,001 to $35,000	10	29
$35,001 to $50,000	24	23
$50,001 to $75,000	27	13
$75,001 or more	27	10

Size of Organization	
100 or fewer employees	16
101 to 500	16
501 to 5,000	30
Over 5,000	20

(Continued)

Table A-5 (Continued)

PROFILE OF CANADIAN OFFICE WORKERS

	Total
Base	250
	%
Type of Organization	
Manufacturing	15
Services	56
Government	23
Nonprofit	5
Years in Workforce	
10 or more years	76
5 to 9 years	16
2 to 4 years	8
1 year or less	1
Median years in workforce	15
Years at Present Employer	
10 or more years	34
5 to 9 years	20
2 to 4 years	28
1 year or less	18
Median years with present employer	5
Years at Present Job	
10 or more years	13
5 to 9 years	19
2 to 4 years	40
1 year or less	28
Median years in present job	3
Marital Status	
Married	63
Divorced/widowed/separated	9
Single/never named	28
Self-Description of Position	
Managerial	38
Technical	33
Secretarial/clerical	25
Union member	29
Children in household	39

Table A-6

PROFILE OF CANADIAN TOP EXECUTIVES

	Total
Base	100
	%
Age	
18 to 29 years	6
30 to 34 years	7
35 to 39 years	17
40 to 49 years	46
50 to 64 years	21
65 and over	-
Median age	42
Median years in workforce	21
Median years at present organization	10
Median years at present position	4
Number of Employees Employed by Organization Nationwide	
Less than 2,000	32
2,000 to 2,999	21
3,000 to 4,999	18
5,000 to 6,999	10
7,000 to 9,999	7
10,000 or more	10
Median	2,550

Table A-7

PROFILE OF CANADIAN FACILITIES MANAGERS

	Total
Base	107
	%
Age	
18 to 29 years	1
25 to 29 years	1
30 to 34 years	12
35 to 39 years	19
40 to 49 years	36
50 to 64 years	26
65 and over	2
Median age	43
Median years in workforce	25
Median years at present organization	10
Median years at present position	5
Number of Employees Employed by Organization Nationwide	
Less than 2,000	31
2,000 to 2,999	18
3,000 to 4,999	18
5,000 to 6,999	10
7,000 to 9,999	4
10,000 or more	14
Median number of employees nationwide	2,750
Median percentage office workers	25%
Median average gross square feet per workstation	101 sq.ft.

Table A-8

PROFILE OF CANADIAN INTERIOR DESIGNERS

	Total
Base	101
	%
Age	
18 to 24 years	1
25 to 29 years	10
30 to 34 years	17
35 to 39 years	25
40 to 49 years	38
50 to 64 years	7
65 and over	-
Median age	38
Median years employed as office design professional	14
Median years employed by current firm	6
Median number of employees in firm	9
Median number of employees solely in contract office interior design	4
Median number of design projects in past three years, with 50+ workstations	10
Median square feet of average office interior project in 1990	19,000
Median average gross square feet per workstation, 1990 projects	101

Sampling Error

The results achieved from any sample survey are subject to sampling error. Sampling error is defined as the difference between the results obtained from the sample and those that would have been obtained had the entire population been surveyed. The size of sampling error varies both with the size of the sample and with the percentage giving a particular answer. The following table sets forth the range of error in samples of different sizes at different percentages of response:

APPROXIMATE SAMPLING TOLERANCES (AT 95% CONFIDENCE) TO USE IN EVALUATING PERCENTAGE RESULTS APPEARING IN THIS REPORT

Number of People Asked Question on Which Survey Result Is Based	Survey Percentage Result at 10% or 90%	Survey Percentage Result at 20% or 80%	Survey Percentage Result at 30% or 70%	Survey Percentage Result at 40% or 60%	Survey Percentage Result at 50%
1,000	2	2	3	3	3
900	2	3	3	3	3
800	2	3	3	3	3
700	2	3	3	4	4
600	2	3	4	4	4
500	3	4	4	4	4
400	3	4	4	5	5
300	3	5	5	6	6
200	4	6	6	7	7
100	6	8	9	10	10
50	8	11	13	14	14

For example, if the response for a sample size of 1,000 is 30%, in 95 out of 100 identical samples drawn from the same population the response would be between 27% and 33%.

Significance of Difference Between Proportions

The difference between the percentage responses given by two independent samples to the same question may or may not be significant. To determine whether or not such a difference is indeed significant, the size of the samples involved and the percentage giving each response must be taken into account. The following table shows the margin of error that must be allowed for different sample sizes at different percentages of response:

APPROXIMATE SAMPLING TOLERANCES (AT 95% CONFIDENCE) TO USE IN EVALUATING DIFFERENCES BETWEEN TWO PERCENTAGE RESULTS APPEARING IN THIS REPORT

Approximate Sample Size of Two Groups Asked Question on Which Survey Result Is Based		Survey Percentage Result at 10% or 90%	Survey Percentage Result at 20% or 80%	Survey Percentage Result at 30% or 70%	Survey Percentage Result at 40% or 60%	Survey Percentage Result at 50%
1,000 vs.	1,000	3	4	4	4	4
	800	3	4	4	5	5
	500	3	4	5	5	5
	300	4	5	6	6	6
	200	5	6	7	7	8
	100	6	8	9	10	10
	50	9	11	13	14	14
800 vs.	800	3	4	4	5	5
	500	3	4	5	5	6
	300	4	5	6	7	7
	200	5	6	7	8	8
	100	6	8	10	10	10
	50	9	11	13	14	14
500 vs.	500	4	4	6	6	6
	300	4	6	7	7	7
	200	6	7	8	8	8
	100	7	9	10	11	11
	50	9	12	13	14	15
300 vs.	300	5	6	7	8	8
	200	5	7	8	9	9
	100	7	9	10	11	[illegible]
	50	9	12	14	15	15
200 vs.	200	6	8	9	10	10
	100	7	10	11	12	[illegible]
	50	9	12	14	15	[illegible]
100 vs.	100	8	11	13	14	14
	50	10	14	16	17	17
50 vs.	50	12	16	18	19	20

For example, suppose one group of size 1,000 has a response of 34% "yes" for a question, and an independent group of size 100 has a response of 23% "yes" for the same question, for a difference of 11 percentage points. According to the table, this difference is subject to a potential sampling error of plus or minus 9 percentage points. Since the observed difference is greater than the potential sampling error, the observed difference is significant. Moreover, if the entire population were interviewed, the difference would be from 1 to 20 percentage points (the 11-point observed difference plus or minus the 9-point potential sampling error) in 95 cases out of 100.

Sampling error is only one way in which survey findings may vary from the findings that would result from interviewing every adult member of the population. Survey research is susceptible to human and mechanical errors as well, such as interviewer recording and data handling errors. However, the procedures used by the Harris firm keep errors of this kind to a minimum.

Study No. 902065

THE OFFICE ENVIRONMENT INDEX 1991:
REPORT OF FINDINGS
FOR THE EUROPEAN ECONOMIC COMMUNITY

A Study Conducted for
Steelcase Inc.

Fieldwork: January-April 1991

Project Directors:

Merl W. Baker, Louis Harris and Associates (U.S.A.)
Erich Kramer, Senior Vice President
Sarah Dutton, Research Associate

Louis Harris and Associates, Inc.
630 Fifth Avenue
New York, New York 10111

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ABOUT THIS STUDY

Since 1978, Steelcase has sponsored survey research exploring the office workplace -- the Office Environment Index. The OEI tracks the views of office workers as well as those of top executives, facilities managers, and office interior designers on a wide range of workplace issues regarding both how work is done and the physical office environment. This sixth OEI was a worldwide undertaking, encompassing not only North America but also the twelve countries of the European Economic Community and Japan. This report presents the findings for the EEC as a whole and for four key countries -- the U.K., Germany, France, and Spain.

These findings are based on interviews with:

-- 1,449 full-time office workers in Europe at organizations with at least 25 office employees at the branch or locations where they work:

    -- 250 in the U.K.
    -- 251 in Germany (Western)
    -- 248 in France
    -- 250 in Spain
    -- 450 in the eight other EEC countries.

-- 518 top executives of large public- and private-sector organizations:

    -- 102 in the U.K.
    -- 103 in Germany (Western)
    -- 103 in France
    -- 103 in Spain
    -- 107 in the eight other EEC countries.

-- 507 facilities managers in large public- and private-sector organizations:

    -- 102 in the U.K.
    -- 100 in Germany (Western)
    -- 100 in France
    -- 101 in Spain
    -- 104 in the eight other EEC countries.

-- 336 contract interior designers, including:

  - -- 91 in the U.K.
  - -- 81 in Germany (Western)
  - -- 80 in France
  - -- 84 in Spain

The EEC total for office workers, top executives, and facilities managers were created by weighting together findings from the twelve countries of the community according to each country's proportionate share of white collar workers in the EEC as reported by the Organization for Economic Cooperation and Development (OECD). Interior designers were sampled in the U.K., Germany, France, and Spain only.

Interviews were conducted by telephone from January through April 1991. Interviews with office workers averaged 25 minutes in length, and those with executives, facilities managers and designers averaged 20 minutes.

The study was designed and conducted by Louis Harris and Associates in conjunction with Steelcase Inc., the Institute of Business Designers, and the International Facility Management Association.

Details on the study method and profiles of the samples are provided in Appendix A.

HIGHLIGHTS FROM THE FINDINGS

- While Their Mood Is Upbeat, EEC Office Workers Are Frustrated on Many Specifics of Office Life.

  -- A 60% majority of EEC office workers believe the quality of working life has improved in the past decade, including substantial majorities of 67% in Spain, 63% in Germany, and 57% in the U.K., but a lower 46% in France.

  -- An overwhelming 87% report they are at least "somewhat satisfied" with their job, with 28% "very satisfied"; office workers in the U.K (36%) and Germany (34%) are most likely to say they are "very satisfied," while those in Spain (18%) and France (16%) are least likely.

  -- A 65% majority of EEC office workers feel "a great deal" of connection between doing their job well and getting what they want most out of life; this linkage is more strongly perceived in the U.K.(65%) and Germany (68%) than in Spain (53%) and France (60%).

  -- However, on specific characteristics of the workplace, EEC office workers show substantial "aspiration gaps" -- the difference between the proportion who say a characteristic is "very important" to them and the proportion who say it is "very true." The widest gaps are seen on honesty of management (80% say this is "very important," and only 26% say it is "very true," creating a "gap" of -54 percentage points), clear goals and direction from management (with a gap of -45 points), management recognition of employee contributions (-41 points), management providing the tools and resources needed to get the job done (-39 points), management recognition and support of the need to protect the natural environment (-38 points), management encouragement of employees to participate in problem-solving (-37 points), and management sensitivity to the need to balance job and family responsibilities (-35 points). In Spain, office worker aspiration gaps are particularly wide, reflecting a relatively high level of importance office workers attach to the various characteristics as well as a relatively low level of prevalence for some of the factors tested. In France the aspiration gaps tend to be narrower, with proportionately fewer than average office workers deeming the characteristics "very important." In the U.K., the gaps track fairly closely with the EEC average, while in Germany the gaps are about the same as the EEC average for some factors but narrower on a handful of key characteristics.

- EEC Top Executives Seem Out of Touch with Office Workers.

  -- Top executives tend to underestimate the degree to which office workers' aspirations are frustrated on key characteristics.

Though EEC top executives are (relatively) in tune with office workers on the reported prevalence of many of these characteristics, they miss the mark widely on the importance of the characteristics to office workers. The honesty of management, management recognition of the need to protect the natural environment, job challenge, employee pride in the quality of products and services produced by the company, employee contributions, management sensitivity to the need to balance job and family, teamwork, and employee participation in problem-solving are all more important to office workers than EEC top executives acknowledge. On average for the sixteen characteristics tested, top executives in Germany come closest to a correct reading of office workers' aspirations gaps, while their counterparts in Spain seem farthest from the mark.

-- Top executives also underestimate the degree of job satisfaction expressed by office workers and the extent to which office workers express a linkage between doing their job well and getting what they want out of life. Only a handful (6% at maximum) of top executives in the EEC overall or any specific country for which the OEI provides readable data would say their office workers are "very satisfied"; because of the higher degree of job satisfaction reported by office workers in the U.K. and Germany, top managers in those countries show a deeper misreading of the office worker mood than do their counterparts in France and Spain. For reasons that seem to have more to do with their own attitudes, top executives in the U.K. and Spain are more likely than those in France or Germany to underestimate the linkage which office workers sense between their job and their life's goals; in fact, top executives in Germany somewhat overestimate the connection.

o Office Workers Would Prefer a More Participative Work Environment.

-- Office workers show substantial aspiration gaps on a handful of characteristics related to participation in the full life of the workplace: management recognition of their contributions (-41 points); management encouragement to participate in problem-solving (-37 points); management encouragement of teamwork (-25 points); and being able to contribute to the organization (-18 points).

-- EEC office workers would rather work independently, identifying problems or goals and getting them solved or achieved (45%), than be given a problem or goal and figure out what to do (35%) or be told what to do and how to do it (4%). Despite their preference for independence, equal proportions of EEC office workers report that they work independently (36%) and are given a problem or goal and devise the solution themselves (37%), while one in ten (10%) are told what to do and how to do it. An independent work mode is more heavily favored in the U.K. and France than in Germany or Spain, and U.K. office workers are most likely to report they now work in an independent manner.

- Total Quality Management Has Made Inroads in the EEC Office Environment, and Receives Enthusiastic Support from Office Workers and Top Executives Alike.

  -- Total quality management, or TQM, is perhaps the larger context for the notion of the participative workplace. Most office workers in the EEC favor the implementation of TQM initiatives in the office workplace; the notion of continuous improvement of the work and the way in which it is done (91%), measuring customer satisfaction (85%), and offering office workers incentive compensation linked to the quality of their work (79%) receive the strongest support, followed by measuring office workers' productivity (60%) and having a "do-it-right-the-first-time" philosophy (59%). Implementation levels, according to office workers, are lower for each TQM measure, most dramatically for offering incentive compensation based on quality to office workers (only 32% say their organization now does so) and having a "do-it-right-the-first-time" philosophy (40%).

  -- German office workers are least likely to favor these initiatives and also least likely to report they have been implemented; Spanish office workers show the strongest support for TQM measures in the office workplace.

  -- Top executives in the EEC also express strong support for TQM. Confirming the pattern seen among office workers, support for and reported implementation of several key TQM initiatives is lowest in Germany.

- Nearly Half of EEC Office Workers Say They're Working as Hard as They Can.

  -- 48% of EEC office workers believe they and their colleagues at the office are "certainly" doing as much work as they can; another 25% feel they're "probably" doing as much as they can, while 26% admit that they and their colleagues could probably be doing more. The proportion who are certain they're doing all they can is a high 58% in the U.K., but a lower 43% in France, 41% in Germany, and 36% in Spain. A high 32% of office workers in both Spain and Germany say they "probably could do more."

  -- Top executives in the EEC overall and across all four countries tested individually underestimate the extent to which office workers are certain they're doing all they can.

  -- EEC office workers report that they work a median of 40 hours per week, and 31% say this is "too much." Office workers in both Germany and Spain report working the EEC average of 40 hours per week, but are more likely than EEC office workers on average to feel this is "too much."

- Computer Use Is Widespread in the EEC Office Workplace.

  -- Fully 80% of EEC office workers say they use distributed processing in the form of a computer terminal or personal computer. Computer usage is highest in the U.K. (84%) and France (82%) and somewhat lower in Germany and Spain (both 77%). One in five (21%) EEC office workers report they use a computer at least five hours a day (in Germany, this figure falls to a low 16%).

-- A 59% majority of EEC top executives report they have a PC or terminal in their office.

o Innovative Work Arrangements Now in Place Fulfill a Relatively Low Level of Expressed Need for Such Arrangements. The Big Exception: Child Care Assistance from Employers.

-- For five of the six innovative work arrangements tested, EEC office workers are at least as likely to report their organization offers them such arrangements as they are to report those arrangements are "very important" to them. The exception is financial support or facilities for child care; nearly twice as many office workers view this as "very important" (41%) as report such an arrangement is available to them (22%). The most frequently offered arrangement -- flexible hours -- are reported available by the same majority of office workers that deem such an arrangement "very important" (58% and 57%, respectively). At a lower level of response, about the same proportion report flexible benefits are offered at their workplace (32%) as deem such an arrangement "very important" (33%); and a similar proportion say they have the opportunity to work at home (20%) as say this is "very important" to them (17%). More office workers report the availability of the remaining two types of arrangement than view them as important: 38% report their employer offers them the opportunity to do a job like theirs part-time, compared with a lower 21% who deem this "very important"; 22% say they can enter into a job-sharing arrangement, compared with a lower 16% who would view this as being of high importance.

o EEC Office Workers Voice Concern About the Natural Environment.

-- A significant proportion of office workers are concerned about the need to protect the natural environment (65% feel it is "very important" that their employer address this issue), yet only a minority report that their organization recognizes this need (27% say this is "very true" on their present job). This is borne out by the finding that a vast majority of office workers in the EEC (95%) favor a recycling program in their office, but a lower 55% say their organization currently recycles office wastes. Nearly all office workers in Germany (99%), the U.K. (97%), Spain (92%), and France (92%) favor recycling in the office workplace. From the reports of office workers, organizations in the U.K. and Germany would appear to be the leaders in actually implementing recycling in the office (63% in the U.K and 79% in Germany report their organizations do so); Spain (23%) and France (22%) lag far behind. EEC top executives recognize their employees' strong support of recycling efforts (92% believe most of their office employees would favor such an initiative); this recognition is overwhelming even in

France (84%) and Spain (83%), where many fewer top executives -- confirming office workers' reports -- assert their organization has such a program in place (35% and 28%, respectively).

- With Implementation Barely Begun, Proactive Health and Substance Abuse Treatment Programs Win Wide Support Among EEC Office Workers. But It's "Thumbs Down" on Drug Testing and AIDS Screening.

  -- A program promoting good health habits is favored by 84% of EEC office workers, although only 35% say their employer currently offers such a program; 74% would favor a drug or alcohol treatment program, although only 17% say such a program is available through their organization today; 67% favor providing employees with information about AIDS in the workplace, while only 20% report that such a program is in place in their organization today. In contrast, only minorities favor drug testing for new hires (40%) or for current employees (37%), or screening prospective employees for AIDS (33%); only minuscule proportions of office workers report implementation of these measures.

  -- Support for drug testing and AIDS screening is highest in Spain and lowest in France.

- Hazards in the Office Workplace

  -- Eyestrain is recognized by EEC office workers (51% say it is at least "somewhat serious"), top executives (31%), and facilities managers (41%) as the most serious of five potential hazards of the office workplace tested -- a view reflected by interior designers in the U.K., France, Germany and Spain (where it shares first place). Other hazards viewed as at least "somewhat serious" by EEC office workers are air quality (39%), potential harmful radiation from video display terminals (33%), the risk of repetitive strain injuries (17%), and exposure to hazardous materials in the building (17%). In general, top executives and facilities managers express lower levels of concern than office workers about these potential hazards, while interior designers express generally higher levels of concern.

- Workspace Arrangements

  -- Private offices with doors seem to dominate office arrangements in the EEC: 51% say they work in such a space, a much lower 31% in open space, and only 17% in partitioned space. However, it turns out that the 51% with private offices consist of 29% who report they share that office with someone else and only 22% who report they are the sole occupant of a private office. One-person private offices are most frequently reported in Germany (29%) and least prevalent in the U.K. (19%), with France (25%) and Spain (21%) falling in between.

  -- A 54% majority of EEC office workers say their job entitles them to a certain type of workspace, furniture, and accessories; 28% report this is the result of a formal standards program, while 22% say it "just works out that way." A larger 65% of all office workers would favor a formal standards program; support for such a program is very high in Germany (80% favor), substantial in the U.K. (63%) and Spain (61%), but much lower in France (only 39% favor, while 45% oppose).

- EEC Office Workers Report Frustration with Specific Features of their Workspace.

  -- EEC office workers report shortfalls between what they feel they need to be productive and what they currently have on six out of eight specific features of their individual workspace tested in the OEI: comfortable heat and air conditioning (a gap of -35 points), enough privacy and quiet (-31 points), proper lighting (-31 points), a comfortable chair (-27 points), adequate storage and file space (-25 points), enough worksurface space to display or spread out work (-23 points). On average, office workers in Spain and the U.K. show the widest gaps on the eight workspace feature items, office workers in Germany somewhat narrower gaps, and those in France by far the narrowest gaps.

  -- EEC facilities managers demonstrate some awareness of shortcomings in the individual workspace, although they somewhat understate the degree of office worker frustration. Interior designers in the U.K., France, Germany, and Spain tend to show much larger gaps than do either office workers or facilities managers.

- Common Facilities

  -- Office facilities in the EEC seem fairly well-equipped when it comes to common areas: 59% of office workers report there are areas set aside for training; 50% say there are areas set aside in which they can work on ongoing projects; and 42% say there are areas other than conference rooms where employees can meet informally. However, only 6% report there are areas set aside for child care.

- The Professional Community

  -- A 60% majority of top executives in the EEC, including 75% in Germany, 61% in the U.K., 50% in France, and 43% in Spain report their organizations have a full-time facilities management function. Most top executives see facilities management and design more as asset management than as an expense -- except in Germany, where it is viewed about equally as asset management and as an expense notwithstanding the finding that full-time facilities management is most common there.

  -- Only a 39% minority of top executives in the EEC say their organization regularly engages outside design professionals, including 47% in the U.K., 37% in Spain, and 33% in both France and Germany. Of those who do, large majorities are at least "somewhat satisfied" with the performance of the design professionals.

- Future Impacts on Office Design

  -- EEC top executives, facilities managers, and interior designers agree that telecommunications and computer needs will take a long lead over the eight other factors tested in their impact on facilities design over the next five years. Health and safety legislation and regulation, the need to attract and retain skilled employees, and space costs are also expected to become key factors.

1: THE GLOBAL PERSPECTIVE

Not surprisingly, the majority of top executives in the European Economic Community say their companies have an international dimension, far surpassing the degree of international activity reported by U.S. and Canadian top executives. Top executives from organizations in Germany and the U.K. report the greatest degree of international scope, while executives in Spain report the least (Table 1-1):

-- Over seven in ten (72%) top executives in the EEC for whom the question is applicable say their organizations face competition from foreign companies; the likelihood of reporting foreign competition is greatest in the U.K. (83%), somewhat lower in France (74%) and Germany (71%), and drops to 57% in Spain.

-- 67% of top executives in the EEC overall for whom the question is applicable say their organization exports products or services; the U.K. leads in this regard (74%), with the Germany and France again following (69% and 67%, respectively). Only one-half (50%) of top executives in Spain for whom the question is applicable report that their organizations export goods or services.

-- 66% of EEC top executives overall for whom the question is applicable report direct investment abroad, including more than three-quarters of top executives in Germany (77%) and the U.K. (76%), over two-thirds of executives in France (68%), but only two in five (40%) Spanish executives.

-- Participation in joint ventures with companies in other countries is reported by 64% of EEC top executives overall for whom the question is applicable. This is most common in the U.K., with 74% of top executives reporting their organization engages in such activity; 64% in Germany and 63% in France say their company is similarly involved; the corresponding proportion in Spain is 33%.

To what extent are EEC office workers in private sector companies aware of their organizations' international activities? Overall, they are reasonably well informed about exports (65% of office workers compared with 67% of top executives), but are less knowledgeable about foreign competition (64% vs. 72%), direct investment (48% vs. 66%), and joint ventures (50% vs. 64%). By country, office workers in Spain are quite well-informed, almost exactly reflecting the responses of Spanish top executives. Office workers in Germany, France and the U.K., however, are considerably less aware of the international activities in which their organization participates (Table 1-2):

-- 70% of French, 67% of U.K. and 64% of German office workers employed in organizations other than non-profit or government entities report their company exports products or services, while a lesser 53% of Spanish workers similarly employed say the same thing.

-- More than three in five office workers in the U.K. (63%) and Germany (62%) say their organizations face competition from abroad, closely followed by 58% in France and 57% in Spain.

-- Office workers report a lesser degree of participation in joint ventures with other companies overseas than top executives; 56% of office workers in the U.K. say their company is engaged in a joint venture abroad, but less than half of office workers in France (49%), Germany (47%) and Spain (35%) report such activity.

-- Similarly, 53% of German office workers, 52% of those in the U.K. and 51% of French office workers say their organization has wholly-owned facilities in other countries, falling to 38% of office workers in Spain.

Observation:

According to top executives, a reliable source of information on the scope of their organization's international activity, the U.K. and Germany currently enjoy a wider level of international business involvement than France or Spain. Indeed, Spain lags well behind the other three countries on all four measures tested, and would appear to be more parochial and isolated than the U.K., France or Germany.

CEO-Q.F2

Table 1-1

INTERNATIONAL ACTIVITY: EEC TOP EXECUTIVES

Base: Those for whom question is applicable

	Top Executives				
	EEC Total	U.K.	France	Germany	Spain
Average base	485	88	99	99	103
Organization:	%	%	%	%	%
Faces competition from foreign companies	72	83	74	71	57
Exports products or services	67	74	67	69	50
Has wholly-owned facilities in other countries	66	76	68	77	40
Participates in joint ventures with companies in other countries	64	74	63	64	33

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Table 1-2

INTERNATIONAL ACTIVITY: EEC OFFICE WORKERS

Base: All except those employed in not-for-profit
or government organizations

	Office Workers				
	EEC Total	U.K.	France	Germany	Spain
Base	1045	180	147	226	183
	%	%	%	%	%
Organization:					
Exports products or services	65	67	70	64	53
Faces competition from foreign countries	64	63	58	62	57
Participates in joint ventures with companies in other countries	50	56	49	47	35
Has wholly-owned facilities in other countries	48	52	51	53	38

2: HOW OFFICE WORKERS FEEL ABOUT THEIR WORK

The Quality of Working Life

As a whole, 60% of EEC office workers perceive that the quality of their work life has improved in the last ten years, while 18% actually think it has gotten worse (Table 2-1). Office workers in Spain report the greatest degree of optimism, as 67% say their work life has improved in the last decade. A majority of office workers in Germany (63%) and the U.K. (57%) also perceive improvement, but less than half, or 46%, of French office workers think their work life has improved and more than one-quarter (27%) think the quality of their working life has actually gotten worse in the last ten years.

Like their counterparts elsewhere, EEC top executives are far more likely than office workers to perceive that the quality of work life has improved (87%); the most optimism is evidenced in Spain (92%), followed by Germany (89%), France (85%) and the U.K. (77%).

Facilities managers and interior designers also take a rosier view than office workers do on the quality of working life.

Across the twelve countries of the EEC, the perception that the quality of working life has improved is slightly more pronounced among younger than among older office workers (Table 2-2).

Job Satisfaction

How satisfied are EEC workers in their jobs? Just over one-quarter (28%) say they are "very satisfied" in the jobs they have now; office workers in the U.K. (36%) and Germany (34%) express substantially higher levels of job satisfaction than those in Spain (18%) or France (16%) (Table 2-3). Office workers in the U.K. and Germany are also more likely than their counterparts in France and Spain to report they are at least "somewhat satisfied." Furthermore, 18% of Spanish office workers and 17% of French workers are at least "somewhat dissatisfied," compared to only 11% in the U.K. and 7% in Germany.

Top executives plainly underestimate satisfaction levels among their employees; only 5% of EEC top executives say they think their office workers are "very satisfied," compared to 28% of office workers in the EEC. A mere 6% of top executives in the U.K. and Germany say their employees are "very satisfied," falling to 5% in Spain and 2% in France. Facilities managers and interior designers also tend to believe workers are less satisfied than they in fact are.

Among office workers in the EEC overall, job satisfaction is highest among those age 50 or over, and lowest among those age 30 to 39. Not surprisingly, managerial level workers in the EEC are more satisfied than those of non-managerial level (Table 2-4).

Linkage Between Job Satisfaction and Personal Happiness

Office workers in the EEC were asked how much connection, or "linkage," they feel between doing their job well and getting what they want out of life. The majority of EEC office workers, 65%, say they feel "a great deal" of linkage between the two, 24% say they feel "only some" linkage, and 9% say they feel their job and personal satisfaction are connected "hardly at all" (Table 2-5). On a country-by-country basis, German and U.K. workers are most likely to see "a great deal" of linkage (68% and 65%, respectively), while 60% of French office workers and a lower 53% of Spanish office workers say the same thing. As many as 14% of office workers in France and Spain see hardly any connection between work and personal goals compared to 9% for the EEC on average.

On average across the twelve EEC countries, top executives underestimate the degree to which office workers feel doing their job well and getting what they want out of life are connected, with just over half (53%) of top executives in the EEC guessing their office workers would feel "a great deal" of connection. Top executives in the U.K. (35%) and Spain (31%) grossly underestimate their workers' sense of linkage, while their counterparts in France show a good understanding of their office workers in this regard (55%) and German top executives somewhat overestimate their office workers' sense of linkage (76%).

Across the EEC, the youngest office workers express the highest sense of linkage, and not surprisingly managers feel a greater degree of linkage than non-managers. Interestingly, the sense of linkage tends to diminish as the size of the office worker's organization increases, and government workers report the lowest level of connection between their job and getting what they want out of life (Table 2-6).

Aspirations and Realities

Office workers were asked how important specific characteristics of the workplace are to them and to what extent they find these characteristics to be true in the job they have now. In addition, top executives were asked to rate how important and how true the same list of sixteen characteristics are for their employees.

Table 2-7 arrays the level of importance attached to each characteristic by both office workers and top executives. The characteristic in the top position on the list, management honesty and ethics, is rated "very important" by fully 80% of EEC office workers. Management providing employees with the tools and resources to get their job done is "very important" to 78% of EEC office workers, while 71% say that job security is "very important." At least 60% but less than 70% say the same about top management providing clear goals and direction for the organization (69%), management recognition of employee contributions (68%), management recognition of the need to support and protect the natural environment (65%), having a challenging job (62%), pride in the quality of the organization's products and services (62%), and encouragement of employees to participate in problem-solving (60%). At least 50% but less than 60% feel the following characteristics are "very important": management sensitivity to the need to balance job and family responsibilities (54%), good pay (53%), encouragement of teamwork (53%), being able to contribute to the organization (51%), and employee benefits (50%). Only two of the sixteen characteristics tested are deemed "very important" by less than 50% of EEC office workers; ample opportunities to move up to a better position (46%) and management encouragement of risk-taking (32%).

Despite the large numbers of office workers who say these characteristics are important to them in the workplace, European office workers are not apt to find these items to be true in their present jobs (Table 2-8). To express the levels of frustration evident in these findings, Table 2-9 presents the "aspiration gap" associated with each characteristic, or the difference between the proportion of office workers who say each characteristic is "very important" for them and the proportion who say it is "very true" in the job they have now. For example, 80% of EEC office workers say management honesty and ethics is "very important" to them, yet only 26% say this is "very true," creating an aspiration gap of -54 percentage points.

The characteristics on which the widest gaps (or highest levels of frustration) are seen are: management honesty and ethics(-54 points), management providing clear goals and direction (-45), management recognition of employee contributions (-41), management providing employees with the tools and resources needed to get their jobs done (-39), management support of the need to protect the environment (-38), encouragement of employee problem-solving (-37) and management sensitivity to the needs of both family and the job (-35). A "second tier" of characteristics showing gaps of less than 30 percentage points but still substantial includes: good pay (-27), employee pride in the products and services of their company (-25), encouragement of teamwork (-25) and ample opportunities to move up (-21). Job challenge (-18), employee contributions (-18), job security (-15), employee benefits (-14), and encouragement of risk-taking (-14) show lower aspiration gaps of less than twenty percentage points.

The following summarizes the importance, the prevalence, and the aspiration gap expressed by office workers in the U.K., France, Germany, and Spain for each characteristic:

-- Management is honest, upright and ethical in its dealing with employees and the community at large is important to fully 80% of EEC office workers, yet only 26% say it is "very true," creating a gap of -54 percentage points. It is most important to Spanish office workers (90% say this is "very important"), followed by Germany (84% "very important"), the U.K. (82%) and France (68%). German office workers are most likely to say this is "very true" for them in their present job (32%), followed by France (25%), Spain (23%) and the U.K. (22%). Lack of fulfillment as expressed by the aspiration gap on this characteristic is most keenly felt among Spanish workers, with an aspiration gap of -67, followed by the U.K. (-60), Germany (-52) and France (-43).

-- Receiving the necessary tools and resources from top management shows a gap of -39 among all EEC office workers (78% say it's important, while only 39% say it is true for them); this is very important to workers in the U.K. (85%) and Spain (84%), but is less so in Germany (78%) and France (65%). More than half of Spanish workers (54%) say this is "very true" for them, followed by 47% of German workers, 38% of French and 37% of office workers in the U.K. The severest aspiration gap is felt by U.K. workers (-48), with German (-31), Spanish (-30) and French workers (-27) expressing roughly similar gaps.

-- Job security is important to 71% of EEC workers, and is true for 56%, creating a gap of -15. This is most important in Spain (78%), less important in the U.K. (73%) and Germany (68%) and least important in France (60%). German workers are most likely to say this is true for them (60%), closely followed by Spain (57%). Job security is more of a problem in the U.K. and France, where less than one-half of office workers (45%) say this is true for them. The gaps are largest in the U.K. (-28) and Spain (-21); in the U.K., the gap is attributable to the relatively low likelihood that workers feel secure in their jobs, while in Spain the high level of importance attached to job security is responsible for the gap. The aspiration gap narrows for French workers (-15), and shrinks even further among German workers (-8).

-- Clear goals and directions from top management shows one of the highest gaps among EEC workers of the sixteen measures tested (-45, with 69% saying it is very important and only 24% saying it's true); it is deemed most important in the U.K. (77%) and least important in France (53%), with Spain and Germany falling in between (69%). Similar proportions of office workers in Germany (27%) and the U.K. (26%) say this is very true for them, followed by slightly lower proportions in France (22%) and Spain (21%). The aspiration gap is greatest in the U.K. (-51) and Spain (-48), falling to -42 in Germany and -31 in France. The comparatively low gap in France is again the result of the relatively low level of importance French workers report on this attribute.

-- Management recognition of employee contributions shows a gap of -41 in the EEC (68% important, 27% true), and is most important in the U.K. (80%), with Spain (76%) and Germany (75%) close behind; only 51% of French office workers say this is very important for them. The likelihood of finding this to be true is highest in Germany (35%); office workers in France (31%) and the U.K. (27%) are slightly less likely to say this is true, and those in Spain are least likely (15%). Accordingly, the aspiration gap for Spanish office workers (-61) is one of the highest found for any country in Europe on any attribute. The gap in the U.K. is also fairly high (-53), dropping in Germany to -40 and in France to -20.

-- Management recognition of the need to support the natural environment is "very important" to 65% of EEC workers and "very true" for 27% (creating a gap of -38). This item is important to 50% of French office workers, rising to 66% in the U.K., 68% in Spain and 78% in Germany. Most office workers do not find this to be true, as only 41% of German workers, 27% in the U.K. and 18% in France and Spain say this is very true. The gap is highest in Spain (-50), followed by the U.K. (-39), Germany (-37) and France (-32).

-- Having a challenging job is recognized as very important by a majority of office workers in all four countries -- 54% in France, 64% in Germany, 68% in the U.K. and fully 85% in Spain. Only in Germany do a majority of office workers (53%) feel this is true; in the U.K. 50% say this is so, falling to 39% in Spain and 26% in France. The aspiration gap is highest in Spain, at -46, dropping to -28 in France, -18 in the U.K. and a narrow -11 in Germany. Overall, EEC office workers show a gap of -18 (62% important vs. 44% true.)

-- Pride in the quality of the products and services their organization provides is very important to three-quarters of U.K. workers and 72% of those in Spain, falling to only 55% in France and Germany. Office workers in the U.K. (44%) and Germany (41%) are most likely to say this is true in their current job, those in France less likely (31%) and those in Spain least likely (28%). Spain leads with the largest gap (-44), followed by the U.K. (-31), France (-24) and Germany (-14). This is important to 62% of all EEC workers, and true for 37%, creating a gap of -25.

-- Encouragement of employee problem-solving presents a gap among EEC office workers of -37 (60% important, and 23% true); it is equally important to office workers in the U.K., Germany and Spain (64%); it is less so in France (53%). However, only 28% of those in the U.K. and Germany say this is true for them, dropping to 17% in France and a mere 12% in Spain. The gap is widest in Spain (-52), followed by the U.K., France and Germany, with gaps of -36.

-- Management sensitivity to family life is important to 54% of EEC office workers, and true for 19%, showing a gap of -35. It is most important in the U.K. (59%), closely followed by Spain (56%) and Germany (54%). Only 40% of office workers in France say this is very important to them. Workers in all four countries are not likely to say this is true for them; only 27% in Germany, 22% in the U.K., and 13% in Spain and France say this is so. The gap is smallest in France and Germany (-27), rising to -37 in the U.K. and -43 in Spain.

-- The gap among EEC office workers for good pay is -27, as 53% say it is important and 26% say it is true. Receiving good pay is more important in Spain (65%) than in the U.K. (57%), Germany (55%) or France (44%). Workers are most likely to say this is true in the U.K. (35%) and Germany (31%) than in Spain (19%) or France (14%). Gaps expressed in the U.K. (-22), Germany (-24) and France (-30) are considerably less than the gap found in Spain (-46).

-- Encouragement of teamwork is most important in Spain (75%), followed by the U.K. (59%), and Germany (54%), and dropping to only 45% in France. This is most prevalent in the U.K. (38%), with France and Germany lower (27%) and Spain even lower still (20%). The widest gap is found in Spain (-55); gaps found in Germany (-27), the U.K. (-21) and especially France (-18) are much lower. The gap in the EEC as a whole is -25 (53% important vs. 28% true.)

-- The ability to contribute significantly to the company is valued by a majority of workers in the U.K. (61%), Spain (56%) and Germany (52%); only 36% of French office workers say this is very important. 40% of office workers in the U.K. and 36% of those in Germany say this is so for them; France and Spain trail behind at 24% and 23% respectively. The gap is larger in Spain (-33) and the U.K. (-21) than in Germany (-16) or France (-12). The gap on this item among EEC office workers is -18 (51% important, 33% true).

-- Employee benefits, such as vacation, are most important in Spain (63%) and the U.K. (54%), followed by France (46%) and finally Germany (39%). Such benefits are most likely to be found in France (44%) and the U.K. (43%), less likely in Germany (30%) and least likely in Spain (22%). Accordingly, Spain experiences the widest gap (-41). The gaps in the U.K. (-11), Germany (-9) and France (-2) are substantially smaller, in fact reflecting a reasonable amount of employee fulfillment. The gap expressed by EEC office workers is a relatively narrow -14 (50% important, 36% true).

-- Ample opportunities to move up in the organization are most valued in Spain (62%), less so in the U.K. (49%), and least important in Germany (41%) and France (39%). Prevalence is lowest in Spain and France (17%), rising to 26% in the U.K. and 28% in Germany. Spain experiences the largest gap (-45), and Germany the smallest (-13), while France and the U.K. fall in the middle, with gaps of -22 and -23 respectively. EEC office workers show a gap of -21 (46% important, and 25% true).

-- Encouragement of risk-taking by employees shows a narrow gap (-14) among EEC office workers as a whole (32% important, 18% true). It is most important in Spain (44%), Germany (35%) and France (34%). Only 16% of office workers in the U.K. say this is very important to them. German workers are most likely to say this is true for them (21%). France (17%), Spain (14%) and the U.K. (13%) follow with fairly low levels of actuality for their office workers. The gap is widest in Spain (-30), less so in France (-17) and Germany (-14), and minimal in the U.K. (-3).

On a country-by-country basis, Spanish workers experience the greatest degree of frustration; on thirteen of the sixteen characteristics measured office workers in Spain show larger aspiration gaps than office workers in the U.K., Germany and France. Most dramatically, Spanish office workers express high levels of frustration on honesty of management (a gap of -67 points), management recognition of employee contributions (-61 points), encouragement of teamwork (-55 points), employee participation in problem-solving (-52 points), and environmental support (-50). At the opposite extreme, French office workers report the lowest aspiration gaps compared to their counterparts in Spain, Germany and the U.K. on 9 of the 16 characteristics measured. Among them are employee benefits (-2), the ability to make a contribution (-12), management recognition of employee contributions (-20), and encouragement of teamwork (-18). Averaging these gaps for all sixteen characteristics suggests that Spanish office workers (-44) are a good deal more frustrated than their counterparts in the U.K. (-31), Germany (-25) and France (-24). As a whole, office workers in the EEC show an average gap of -29.

Among office workers in the twelve EEC countries overall, it is not surprising that non-managerial employees show larger gaps than managers on several characteristics including management recognition and support for protecting the natural environment, management sensitivity to the need to balance job and family responsibilities, good pay, and -- with a much narrower gap overall -- employee benefits. Those in larger organizations tend to show wider gaps than those in smaller organizations do on management honesty and ethics, management goals and direction, encouragement of problem-solving, pride in the products and services the organization provides, advancement opportunities, job challenge, and being able to make a contribution (Table 2-10).

To what extent does management understand the gap between what office workers say they want in the workplace and what they actually find exists? Top executives in the EEC as a whole come close to anticipating workers frustrations on only a handful of items, and consistently underestimate the lack of fulfillment office workers feel on the majority of items (Table 2-9).

-- Top executives in Spain display the most serious misunderstanding of the frustrations experienced by their office workers, coming close to anticipating the gaps expressed by office workers only on job security (showing a gap of -21 among office workers and -29 among top executives about their office workers), good pay (-46 for office workers and -45 for top executives about their workers) and ample opportunity to move up (-45 vs. -48; top executives overestimate the frustration office workers feel on this item). Management shows the severest lack of understanding on the need to protect the environment (-50 for workers and -11 for their bosses), the honesty of management (-67 for workers and -33 for top executives) and management recognition of employee contributions (-61 and -30).

-- In the U.K., top executives come close to appreciating their employees frustrations on a number of items; ample opportunities to move up (-23 for office workers and -21 for executives), job challenge (-18 vs. -17), encouraging employees to take risks (-3 vs. -1), encouragement of teamwork (-21 vs. -14), employee benefits (-11 vs. -4) and two items for which executives overestimate the degree of frustration their employees express, good pay (-22 vs. -25) and job security (-28 vs. -29). However, top executives miss the mark on the honesty of management (-60 vs. -20), the need to protect the environment (-39 vs. -3), clear goals and direction from management (-51 vs. -26) and management sensitivity to the need to balance a job and the family (-37 vs. -15). On the whole, management in the U.K. does a fair job of understanding their employees aspirations.

-- French managers are aware of the frustrations their employees experience regarding encouragement of employee contributions (-12 vs. -10), recognition for such contributions (-20 vs. -17), and the encouragement of teamwork (-18 vs. -11). They incorrectly anticipate worker frustrations on the honesty of management (-43 vs. -12) and good pay (-30 vs. -8). French executives do well for the most part on understanding their employees.

-- German executives come closer to anticipating the extent to which their employees desires are unmet than executives in the U.K., France or Spain. German executives are in sync with their workers on management recognition of employee contributions (-40 vs. -38), employee pride in the quality of goods and services (-14 vs. -13), ample opportunities to move up (-13 vs. -7) and employee benefits (-9 vs. -2), and overestimate workers frustrations on job security (-8 vs. -15) and having a challenging job (-11 vs. -13). The only item seriously misunderstood by German management is the need to protect the environment (-37 vs. -16).

Restructuring

In an attempt to better understand the context for employee perceptions about their workplace, office workers and top executives were asked about the extent of corporate restructuring within the European workplace (Tables 2-11 and 2-12).

-- More than half (54%) of EEC top executives say their company has "reorganized, changing senior management and how the organization is run in a major way" within the past year or two. This is reported by a high 80% of top executives in the U.K. A majority of Spanish executives (65%) also report managerial-level reorganization within the past few years. The corresponding proportions in Germany and France drop to 36% and 28% respectively. Office workers show the same pattern, with 42% in the EEC overall reporting reorganizations; the reading is highest in the U.K. (59%), followed by Spain (44%), Germany (33%) and France (29%).

-- In the EEC overall, 38% of top executives and 22% of office workers say their organization has "bought another company." More top executives in France (46%) and Germany (41%) than in the U.K. (35%) and Spain (only 18%) report an acquisition in the past year or two. Similar proportions of office workers in the U.K. (24%), France (22%) and Germany (21%) say their organization has bought another company, while only 15% of Spanish workers say the same thing.

-- 29% of top executives and 20% of office workers across the EEC report their organization has "eliminated a large number of managerial or other "white collar" jobs through layoffs, early retirements, or other means." According to top executives, layoffs have been most prevalent in the U.K. (44%), followed by Spain (27%), France (25%) and finally Germany (17%). Office workers in the U.K. (28%) and France (26%) are more likely to report layoffs than their counterparts in Germany (15%) and Spain (14%).

-- 12% of EEC top executives and office workers report their organization has merged in the past year or two. Mergers have been most common in Spain and Germany, as top executives in those countries report -- 15% in Spain and 12% in Germany say their organizations have "merged with another company to form a new company." Less than one in ten (9%) executives in the U.K. and France say their companies have merged in the past year or two. Office workers show a slightly different picture; 15% in France, 13% in Spain, 11% in the U.K. and 9% in Germany say their companies have merged with another company.

-- Although substantial proportions report their organization has bought another company, only 7% of top executives and 8% of office workers across the EEC say their company has been bought in the past year or two. Spanish executives are most likely to say their organization has been acquired; 14% say their organization has "been bought by another company." The corresponding proportion in the U.K. is 11%, falling to 8% in Germany and only 4% in France. Twelve percent of office workers in the U.K. say their organization has been bought by another company, dropping to 8% in Spain, 6% in France and 5% in Germany.

-- Looking to the future, 22% of EEC top executives and 16% of EEC office workers overall expect white collar layoffs in the coming year. Fully 41% of top executives in the U.K. "expect their organization to eliminate a large number of white collar jobs" in the next twelve months, indicating continuing conditions of instability for the U.K. office worker. Only 17% of executives in Spain anticipate layoffs in the next year; such layoffs are expected equally in France and Germany (9%). Expectations among office workers for white collar layoffs are also highest in the U.K. (27%).

Observation:

The findings from this first worldwide OEI suggest that the U.S. and Canada have the most hospitable office environments, Japan has by far the dreariest, and the twelve countries of the EEC -- taken on average -- are somewhere in between. And as is found elsewhere in the world, top management fails to understand office workers and how they feel about their jobs.

Spanish office workers tend to show wider-than-average "gaps" between what they want in the workplace and what they are confronted with. However, it is important to recognize that these gaps are as much the result of high expectations as of poor perceived working conditions. Indeed, Spanish office workers are more likely than average to feel the quality of working life is getting better.

Conversely, French office workers tend to show smaller than average aspiration gaps. This is not because they are more likely than others to find the characteristics to be true, but because they are less demanding -- indicative, perhaps, of an underlying cynicism. Indeed, French office workers are not only below the EEC average on job satisfaction but lag on overall quality of working life as well.

What factors contribute to worker expectations and satisfaction? Education may play a role here, as rising expectations are often associated with higher levels of education. This is borne out by the data in that Spanish office workers tend to be better-educated than their counterparts in Germany, France and the U.K. In fact, 40% of Spanish office workers have a university degree, compared to 23% in the U.K., 23% in France and 19% in Germany. Furthermore, German and U.K. office workers are more likely to have left school at the minimum age possible (35%) than those in France (18%) or Spain (9%).

Both top executives and office workers in the U.K. are more likely than average to report elimination of white collar jobs and management reorganizations in the past year or two and to anticipate further white collar layoffs in the next year. Indeed, the "aspiration gap" shown by office workers on job security is far higher in the U.K. than in the EEC on average.

German office workers are relatively optimistic, satisfied, and engaged in their jobs, and show less frustration than average on several key specifics. German top executives come closer than average to understanding the degree of linkage that office workers perceive between doing their job well and getting what they want out of life and the extent to which office workers' aspirations on specific characteristics are unfulfilled.

OW-Q.1a; CEO-Q.1a;
FM-Q.1a; ID-Q.1a

Table 2-1

QUALITY OF WORKING LIFE COMPARED TO TEN YEARS AGO: EEC OFFICE WORKERS AND EXECUTIVES

	Office Workers					Top Executives				
	EEC Total	U.K.	France	Germany	Spain	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250	518	102	103	103	103
	%	%	%	%	%	%	%	%	%	%
Improved	60	57	46	63	67	87	77	85	89	92
Gotten worse	18	18	27	19	16	6	10	9	5	4
Stayed the same	17	21	22	13	12	5	12	6	5	3
Not sure	6	4	6	5	5	1	1	-	1	1

	Facilities Managers					Interior Designers			
	EEC Total	U.K.	France	Germany	Spain	U.K.	France	Germany	Spain
Base	507	102	100	100	101	91	80	81	84
	%	%	%	%	%	%	%	%	%
Improved	82	76	75	85	87	80	66	88	92
Gotten worse	8	16	5	6	2	2	18	5	2
Stayed the same	9	8	17	7	9	12	14	6	4
Not sure	2	-	3	2	2	5	3	1	2

OW-Q.1a

Table 2-2

QUALITY OF WORKING LIFE COMPARED TO TEN YEARS AGO: EEC OFFICE WORKERS BY AGE

	EEC Total	Age 18-29	30-39	40-49	50+
Base	1449	346	465	382	219
	%	%	%	%	%
Improved	60	63	59	59	56
Gotten worse	18	9	17	20	26
Stayed the same	17	15	19	18	17
Not sure	6	12	5	3	1

OW-Q.3a; CEO-Q.3a;
FM-Q.3; ID-Q.3a

Table 2-3

OFFICE WORKER JOB SATISFACTION: EEC OFFICE WORKERS AND EXECUTIVES

	Office Workers					Top Executives Answering About Their Employees				
	EEC Total	U.K.	France	Germany	Spain	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250	518	102	103	103	103
	%	%	%	%	%	%	%	%	%	%
Very satisfied	28	36	16	34	18	5	6	2	6	5
Somewhat satisfied	59	53	67	58	64	80	82	80	85	71
Somewhat dissatisfied	10	9	16	6	15	14	10	17	7	23
Very dissatisfied	2	2	1	1	3	*	-	1	-	-

	Facilities Managers Answering About Their Employees					Interior Designers Answering About Most Office Employees			
	EEC Total	U.K.	France	Germany	Spain	U.K.	France	Germany	Spain
Base	507	102	100	100	101	91	80	81	84
	%	%	%	%	%	%	%	%	%
Very satisfied	6	11	4	5	1	4	5	10	2
Somewhat satisfied	71	70	74	73	69	75	48	77	45
Somewhat dissatisfied	20	18	16	19	25	18	29	10	23
Very dissatisfied	1	-	-	-	-	-	-	-	-

OW-Q.3a

Table 2-4

OFFICE WORKER JOB SATISFACTION: EEC OFFICE WORKERS BY AGE AND JOB LEVEL

		Age				Job Level	
	EEC Total	18-29	30-39	40-49	50+	Managerial	Non-Managerial
Base	1449	346	465	382	219	455	994
	%	%	%	%	%	%	%
Very satisfied	28	29	24	27	36	34	26
Somewhat satisfied	59	58	62	61	54	58	60
Somewhat dissatisfied	10	10	12	10	9	6	12
Very dissatisfied	2	2	2	2	1	1	2

OW-Q.1b; CEO-Q.1b;

Table 2-5

CONNECTION BETWEEN DOING JOB WELL AND GETTING WHAT YOU WANT OUT OF LIFE: EEC OFFICE WORKERS AND EXECUTIVES

	Office Workers					Top Executives Answering About Their Employees				
	EEC Total	U.K.	France	Germany	Spain	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250	518	102	103	103	103
	%	%	%	%	%	%	%	%	%	%
Great deal	65	65	60	68	53	53	35	55	76	31
Only some	24	23	24	27	33	38	55	25	22	61
Hardly at all	9	9	14	5	14	7	7	13	2	5
Not sure	2	2	1	1	1	3	3	7	-	3

OW-Q.1b

Table 2-6

CONNECTION BETWEEN DOING JOB WELL AND GETTING WHAT YOU WANT OUT OF LIFE: EEC OFFICE WORKERS BY AGE, JOB LEVEL, SIZE OF ORGANIZATION, AND TYPE OF ORGANIZATION

		Age				Job Level		Size of Organization				Type of Organization		
	EEC Total	18-29	30-39	40-49	50+	Managerial	Non-Managerial	100 or Less	101- to 500	501-5000	Over 5000	Manufacturing	Service	Government
Base	1449	346	465	382	219	455	994	165	222	378	390	383	646	377
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Great deal	65	68	64	61	64	68	63	73	71	67	60	66	69	55
Only some	24	23	25	26	27	22	26	16	21	25	26	26	21	28
Hardly at all	9	7	10	11	8	9	9	10	7	7	12	6	8	16
Not sure	2	1	1	2	2	1	2	1	1	1	2	2	2	1

OW-Q.2a, 2c;
CEO-Q.2a, 2c

Table 2-7

OFFICE CHARACTERISTICS: IMPORTANCE: EEC OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers ("Very Important" to Them)					Top Executives ("Very Important" For their Employees)				
	EEC Total	U.K.	France	Germany	Spain	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250	518	102	103	103	103
	%	%	%	%	%	%	%	%	%	%
Management is honest, upright, and ethical in its dealing with employees and the community at large	80	82	68	84	90	67	63	67	68	83
Management provides me with the tools and resources to get my job done	76	85	65	78	84	69	62	63	54	75
My job is secure from layoffs	71	73	60	68	78	66	51	53	67	90
Top management provides clear goals and direction for the organization	69	77	53	69	69	63	51	56	64	66
Management recognizes my contributions	68	80	51	75	76	63	65	55	61	68
Management recognizes and supports the need to protect the natural environment	65	66	50	78	68	39	28	31	53	42
My job is challenging	62	68	54	64	85	39	40	54	34	53
I'm proud of the quality of the products and services this organization provides	62	75	55	55	72	49	51	54	47	55

(Continued)

OW-Q.2a, 2c;
CEO-Q.2a, 2c

Table 2-7 (Continued)

OFFICE CHARACTERISTICS: IMPORTANCE: EEC OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers ("Very Important" to Them)					Top Executives ("Very Important" For their Employees)				
	EEC Total	U.K.	France	Germany	Spain	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250	518	102	103	103	103
	%	%	%	%	%	%	%	%	%	%
Employees at all levels are encouraged to participate in problem-solving	60	64	53	64	64	40	33	38	41	50
Management is sensitive to the need to balance job and family responsibilities	54	59	40	54	56	32	25	23	34	46
The pay is good	53	57	44	55	65	52	52	51	42	67
Employees at all levels are encouraged to work in teams	53	59	45	54	75	36	36	39	29	54
I can contribute significantly to my company	51	61	36	52	56	27	31	35	18	38
The employee benefits -- such as insurance and vacation -- are good	50	54	46	39	63	38	43	32	17	51
There are ample opportunities for me to move up to a better position in my company	46	49	39	41	62	44	37	40	29	71
I'm encouraged to take risks	32	16	34	35	44	21	14	20	12	23

OW-Q.2b, 2d;
CEO-Q.2b, 2d

Table 2-8

OFFICE CHARACTERISTICS: PREVALENCE: EEC OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers ("Very True on their Present Job")					Top Executives ("Very True" For their Employees)				
	EEC Total	U.K.	France	Germany	Spain	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250	518	102	103	103	103
	%	%	%	%	%	%	%	%	%	%
My job is secure from layoffs	56	45	45	60	57	46	22	52	52	61
My job is challenging	44	50	26	53	39	26	23	38	21	20
Management provides me with the tools and resources to get my job done	39	37	38	47	54	48	33	53	39	63
I'm proud of the quality of the products and services this organization provides	37	44	31	41	28	35	36	45	34	35
The employee benefits -- such as vacation -- are good	36	43	44	30	22	34	39	39	15	31
I can contribute significantly to my company	33	40	24	36	23	20	19	25	14	17
Employees at all levels are encouraged to work in teams	28	38	27	27	20	26	22	28	18	24
Management recognizes my contributions	27	27	31	35	15	32	32	38	23	38
Management recognizes and supports the need to protect the natural environment	27	27	18	41	18	30	25	20	37	31

(Continued)

OW-Q.2b, 2d;
CEO-Q.2b, 2d

Table 2-8 (Continued)

OFFICE CHARACTERISTICS: PREVALENCE: EEC OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers ("Very True on their Present Job")					Top Executives ("Very True" For their Employees)				
	EEC Total	U.K.	France	Germany	Spain	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250	518	102	103	103	103
	%	%	%	%	%	%	%	%	%	%
The pay is good	26	35	14	31	19	32	27	43	29	22
Management is honest, upright, and ethical in its dealing with employees and the community at large	26	22	25	32	23	44	43	55	23	50
There are ample opportunities for me to move up to a better position	25	26	17	28	17	27	16	36	22	23
Top management provides clear goals and direction for the organization	24	26	22	27	21	38	25	39	32	37
Employees at all levels are encouraged to participate in problem-solving	23	28	17	28	12	22	16	23	17	16
Management is sensitive to the need to balance job and family responsibilities	19	22	13	27	13	15	10	11	16	17
I'm encouraged to take risks	18	13	17	21	14	14	13	14	8	11

OW-Q.2a, 2b, 2c, 2d;
CEO-Q.2a, 2b, 2c, 2d

Table 2-9

OFFICE CHARACTERISTICS: ASPIRATION GAPS: EEC OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers					Top Executives				
	EEC Total	U.K.	France	Germany	Spain	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250	518	102	103	103	103
Management is honest, upright, and ethical in its dealing with employees and the community at large	-54	-60	-43	-52	-67	-23	-20	-12	-45	-33
Top management provides clear goals and direction for the organization	-45	-51	-31	-42	-48	-25	-26	-17	-32	-29
Management recognizes my contributions	-41	-53	-20	-40	-61	-31	-33	-17	-38	-30
Management provides me with the tools and resources to get my job done	-39	-48	-27	-31	-30	-21	-29	-10	-15	-12
Management recognizes and supports the need to protect the natural environment	-38	-39	-32	-37	-50	-9	-3	-11	-16	-11
Employees at all levels are encouraged to participate in problem-solving	-37	-36	-36	-36	-52	-18	-17	-15	-24	-34
Management is sensitive to the needs to balance job and family responsibilities	-35	-37	-27	-27	-43	-17	-15	-12	-18	-29
The pay is good	-27	-22	-30	-24	-46	-20	-25	-8	-13	-45

(Continued)

OW-Q.2a, 2b, 2c, 2d;
CEO-Q.2a, 2b, 2c, 2d

Table 2-9 (Continued)

OFFICE CHARACTERISTICS: ASPIRATION GAPS: EEC OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers					Top Executives				
	EEC Total	U.K.	France	Germany	Spain	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250	518	102	103	103	103
	%	%	%	%	%	%	%	%	%	%
I'm proud of the quality of the products and services this organization provides	-25	-31	-24	-14	-44	-14	-15	-9	-13	-20
Employees at all levels are encouraged to work in teams	-25	-21	-18	-27	-55	-10	-14	-11	-11	-30
There are ample opportunities for me to move up to a better position in my company	-21	-23	-22	-13	-45	-17	-21	-4	-7	-48
My job is challenging	-18	-18	-28	-11	-46	-13	-17	-16	-13	-33
I can contribute significantly to my company	-18	-21	-12	-16	-33	-7	-12	-10	-4	-11
My job is secure from layoffs	-15	-28	-15	-8	-21	-20	-29	-1	-15	-29
The employee benefits -- such as vacation -- are good	-14	-11	-2	-9	-41	-4	-4	+7	-2	-20
I'm encouraged to take risks	-14	-3	-17	-14	-30	-7	-1	-6	-4	-12

OW-Q.2a, 2b, 2c, 2d

Table 2-10

OFFICE CHARACTERISTICS: ASPIRATION GAPS:
EEC OFFICE WORKERS BY JOB LEVEL AND SIZE OF ORGANIZATION

		Job Level		Size of Organization			
	EEC Total	Managerial	Non-Managerial	100 or Less	101-500	501-5000	Over 5000
Base	1449	455	994	165	222	378	390
Management is honest, upright, and ethical in its dealing with employees and the community at large	-54	-52	-55	-42	-50	-59	-59
Top management provides clear goals and direction for the organization	-45	-48	-44	-44	-39	-48	-50
Management recognizes my contributions	-41	-40	-42	-38	-42	-44	-43
Management provides me with the tools and resources to get my job done	-39	-36	-40	-35	-36	-39	-41
Management recognizes and supports the need to protect the natural environment	-38	-31	-41	-40	-38	-34	-40
Employees at all levels are encouraged to participate in problem-solving	-37	-35	-39	-25	-36	-43	-39
Management is sensitive to the needs to balance job and family responsibilities	-35	-28	-37	-31	-32	-35	-37
The pay is good	-27	-20	-30	-23	-24	-20	-31
I'm proud of the quality of the products and services this organization provides	-25	-29	-23	-19	-20	-27	-30
Employees at all levels are encouraged to work in teams	-25	-27	-24	-23	-22	-27	-24

(Continued)

OW-Q.2a, 2b, 2c, 2d

Table 2-10 (Continued)

OFFICE CHARACTERISTICS: ASPIRATION GAPS: EEC OFFICE WORKERS BY JOB LEVEL AND SIZE OF ORGANIZATION

		Job Level		Size of Organization			
	EEC Total	Managerial	Non-Managerial	100 or Less	101-500	501-5000	Over 5000
Base	1449	455	994	165	222	378	390
There are ample opportunities for me to move up to a better position in my company	-21	-21	-21	-11	-23	-21	-25
My job is challenging	-18	-17	-19	-13	-13	-18	-23
I can contribute significantly to my company	-18	-17	-19	-8	-18	-20	-20
My job is secure from layoffs	-15	-10	-17	-19	-18	-15	-15
The employee benefits -- such as vacation -- are good	-14	-6	-17	-14	-7	-16	-11
I'm encouraged to take risks	-14	-16	-14	-12	-10	-15	-14

CEO-Q.4a, 4b

Table 2-11

RESTRUCTURING: EEC TOP EXECUTIVES

	Top Executives				
	EEC Total	U.K.	France	Germany	Spain
Base	518	102	103	103	103
	%	%	%	%	%
Within Past Year or Two, Organization Has:					
Reorganized, changing senior management and how the organization is run in a major way	54	80	28	36	65
Bought another company	38	35	46	41	18
Eliminated a large number of managerial or other "white collar" jobs through layoffs, early retirements, or other means	29	44	25	17	27
Merged with another company to form a new company	12	9	9	12	15
Been bought by another company	7	11	4	8	14
In Next 12 Months:					
Expect organization to eliminate a large number of "white collar" jobs	22	41	9	9	17

OW-Q.3c, 3d

Table 2-12

RESTRUCTURING: EEC OFFICE WORKERS

	Office Workers				
	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250
	%	%	%	%	%
Within Past Year or Two, Organization Has:					
Reorganized, changing senior management and how the organization is run in a major way	42	59	29	33	44
Bought another company	22	24	22	21	15
Eliminated a large number of managerial or other "white collar" jobs through layoffs, early retirements, or other means	20	28	26	15	14
Merged with another company to form a new company	12	11	15	9	13
Been bought by another company	8	12	6	5	8
In Next 12 Months:					
Expect organization to eliminate a large number of "white collar" jobs	16	27	19	10	13

3: HOW OFFICE WORKERS WORK

The Participative Workplace

The aspiration gap findings indicate that EEC office workers are more fulfilled on some aspects of the participative workplace (having a challenging job, being able to work in teams and being able to contribute to their organizations) than on others (management recognition of employee contributions, employee participation in problem-solving). In another measure of the extent of employee participation, office workers were asked to characterize the degree of initiative they currently have in their job and that which they would prefer. All in all, European office workers would prefer a somewhat more independent mode of working than they report they now have (Table 3-1). Nearly half (45%) want to "identify problems or goals, and get them solved or achieved"; 35% want to be "given a problem to solve or a goal to achieve, and "figure out what to do and how to do it"; and only 4% prefer to be "pretty much told what to do and how to do it." By their own reports, a lesser 36% identify problems and get them solved today, a similar 37% are given problems to solve, and as many as 10% are simply told what to do.

On a country-by-country basis, office workers in the U.K. enjoy the greatest level of independence; 50% of office workers say they currently identify and solve problems and goals, and 55% say they would prefer to. Roughly equal proportions say they are given a problem or goal and decide how to solve or achieve it (30%) as say they want to work this way (29%), but only 5% say they prefer to be told what to do and how to do it and 9% say they work in this manner. French office workers prefer to work autonomously (55%), yet are more likely than those in the U.K. to feel frustrated, as only 41% report they do so now. Office workers in France are more likely to be given a problem to solve and figure out the solution themselves (43%); a lesser 33% state this as their preference. Only 6% of French office workers are told what to do and how to do it, the lowest figure among the EEC countries measured, and 3% prefer to work in this manner. German office workers also prefer to work independently (44%), though to a lesser extent than workers in the U.K. and France; 32% say this is their regular manner of working. Similar proportions of German office workers prefer to be (30%) and currently are (32%) working in a mode where they are given a problem to solve and decide how to solve it, but only 2% want to be told what to do (9% say they are told what to do in their present job). Breaking the trend toward autonomy, Spanish workers prefer to be given a problem to solve and figure out their own solution (42%) rather than to identify problems and solutions themselves (37%); the corresponding proportions for how they currently work are 38% and 29%. Spanish office workers, however, do not want to be completely without responsibility and decision-making authority; though they are told what to do more often than workers in the U.K., Germany or France (14%), only 3% state this as their preference.

Not surprisingly, across the twelve EEC countries managerial employees are much more likely than non-managers to report that they identify problems or goals and get them solved or achieved (Table 3-2).

EEC office workers spend more than half of their time (54% of their work week, on average) working alone; this trend remains consistent between the U.K. (56%), France (55%), Spain (53%) and Germany (52%) (Table 3-3). Though Spanish office workers express by far the widest aspiration gap on management encouragement of teamwork, Spanish office workers on average spend as much of their time working on a formal team (28%) as their counterparts in the U.K. (26%), France, and Germany (both 23%). German office workers spend slightly more of their time working informally with others (25%) than those in the U.K. (18%) or Spain (19%).

Total Quality Management

Total quality management, or TQM, though traditionally associated with industrial environments, is finding increasing application in the service sector and even government organizations. Notwithstanding some dramatic differences by country, the findings indicate that TQM has made serious inroads in the EEC office environment and is supported enthusiastically by office workers and top executives alike (Table 3-4 and Table 3-5).

-- In the EEC overall, both office workers (91%) and top executives (97%) strongly favor the "notion of continuous improvement of the work and the way things are done in the office." The proportion of office workers who favor this measure moves from a low of 87% in France to 89% in Germany, rising further to 93% in the U.K. and 95% in Spain. Fewer office workers are likely to say this has been implemented than favor the idea; 65% of EEC office workers report their organization has adopted this measure, including 58% of office workers in Germany, 64% in France and Spain, and 79% in the U.K. Top executives express similar enthusiasm, with 97% favoring such a measure, including 93% in Germany, 95% in France, 98% in Spain, and 100% in the U.K. Top executives are somewhat less likely to report their organizations have implemented such an initiative (83%). Top executives in Germany are least likely (76%) to say their company does so, somewhat more likely in France and Spain (83%) and most likely in the U.K. (95%).

-- Customer satisfaction measurement is also strongly supported in the EEC; 85% of office workers would favor such an initiative, while 56% say their organization does this now. Spanish workers report the strongest enthusiasm for "measuring the satisfaction of their office's customers or clients, either external or within the organization" (72% say their organization now does so, and 95% favor the idea); Germans least likely (only 41% say their firm does so, and 76% favor), while the French (70% now do so, 86% favor) and U.K. (65% do so now, 91% favor) office workers fall in between. This TQM measure is favored by about the same proportion of top executives (87%) as office workers (85%); Spanish top executives express strong support (96%), as do those in the U.K. (93%) and France (91%). German executives are least likely to favor measuring customer satisfaction (61%). Fully 95% of Spanish top executives say their organization does so now, followed by 74% in France, 71% in the U.K. and only 24% in Germany.

-- "Measuring office worker productivity" receives less support from EEC office workers (60% favor) than most other TQM measures, particularly in France (48%) and Germany (49%). Sixty-nine percent favor such measurement in the U.K., rising to 72% in Spain. The proportion of office workers who say their organization performs such measurements is lower in the EEC overall (41%) and in all countries except France, where this initiative is most prevalent (51% say their organization does so now). Forty-five per cent of office workers in Spain and the U.K. say this is currently done, falling to only 30% in Germany. A majority of top executives favor measuring office worker productivity in the EEC overall (67%) and in all four countries that can be studied separately: 75% in France, 68% in Spain, 64% in the U.K. and 60% in Germany. Implementation is considerably lower, as only 27% of top executives overall (including 17% in Germany, 25% in the U.K., 35% in Spain, and 47% in France) say their organization does so now.

-- Over half of EEC office workers overall (59%) favor a "do-it-right-the-first-time" philosophy, and 40% say it is currently done. Office workers in Spain favor this TQM element (74%) most strongly, followed by the U.K. (68%), France (59%), and Germany (39%). According to office workers, this TQM measure is practiced most commonly in the U.K. (56%) and Spain (53%), somewhat less so in France (48%), and minimally in Germany (19%). EEC top executives also express greater levels of support (72%) than of implementation (47%). A minority of top executives in Germany favor this measure (43%), though it is more enthusiastically received in France (77%), Spain (80%), and the U.K. (91%). Executives in Spain and the U.K. report the highest levels of implementation (67% and 66%, respectively), falling to 56% in France and 26% in Germany.

-- Only one-third (32%) of EEC office workers say their organization offers incentive compensation linked to quality of work, despite a high 79% in favor. This initiative is not practiced among most offices in Spain, according to office workers; only 22% say their organization does so now, despite 73% who say they would favor doing so. According to office workers, this practice is more common in the U.K. (30%), Germany (38%) and France (39%), though in these countries as well only a minority of office workers report that it is done despite strong support (82% in the U.K., 85% in Germany and 76% in France). In all, 82% of EEC top executives would support such a measure, compared with a lower 45% who report their organization has implemented a program linking incentive compensation to work quality. Top executives show strong support for this measure in each of the four countries that can be studied separately (71% in the U.K., 79% in Spain, and 87% in both France and Germany); top executives in France are most likely to report they now do so (66%), German and Spanish executives less likely (48% in Germany and 38% in Spain), while executives in the U.K. are least likely to do so (32%).

-- By way of comparison, office workers are less supportive of a pre-TQM concept, "linking incentive compensation to the quantity of their work." Sixty percent of EEC office workers would favor such an initiative; 24% report this is done in their organization. Sixty-four percent of office workers in Germany favor this (only 30% report it is done); 63% favor this incentive in Spain (only 18% say it is practiced); 60% favor doing so in the U.K. (21% say it is now done); and 57% of office workers in France say they support this concept (though France reports the highest level of implementation, at 32%). Sixty-four percent of top executives favor the measure; 34% report it is currently done in their organization. Top executives in France and Germany favor this type of incentive equally (68%), closely followed by Spain (67%), with top executives in the U.K. the least supportive (51%). Fully 50% of executives in France report that this is currently done, dropping to 35% in Germany, 33% in Spain and 22% in the U.K.

Across the EEC, office workers in government employment are less likely than their counterparts in the private sector to report their organization has implemented a continuous improvement philosophy, customer satisfaction measurements, a "do-it-right-the-first-time" philosophy, or a policy of incentive compensation for quality of work (Table 3-6).

Productivity

How "pushed to the wall" are office workers in Europe? Nearly half (48%) of European office workers say they "certainly do as much as they can." By a wide margin, office workers in the U.K. feel most "pushed to the wall," as 58% say they "certainly do as much as they can," falling to 43% in France, 41%

in Germany and 36% in Spain. Nearly one-third (32%) of office workers in Germany and Spain say they "could do more," falling to roughly one-quarter in the U.K. (26%) and France (24%) (Table 3-7). Top executives and facilities managers underestimate the extent to which office workers feel "pushed to the wall" in all four countries, and interior designers are the most harsh -- less than one in ten designers in the U.K., France, Spain and Germany think office workers "certainly" do as much as they can.

Hours Put In

On a median basis, office workers in the EEC say they work 40 hours per week; 31% think this is "too much time" (Table 3-8). Those in the U.K. report they work 38 hours per week, one hour less than their French counterparts and two hours less than their counterparts in Germany and Spain. Perhaps as a result, workers in the U.K. are least likely to feel their hours are "too much" (23%); German and Spanish office workers are most likely to say their hours are "too much" (38% and 37%, respectively), followed by France (31%).

Across the EEC, self-described managers report putting in more hours per week than non-managers, and are also more likely to feel they work too many hours (Table 3-9).

Office workers in the EEC overall report spending a median of 2 hours in meetings each week. German workers spend the most time in meetings per week (a median of 4 hours); office workers in the U.K. and France the least (a median of 2 hours per week); and Spanish workers spend a median of 3 hours per week in meetings (Table 3-10). Though the majority of office workers in the EEC overall and in each country that can be studied separately think the time they spend in meetings is "just right," 14% of office workers overall -- including 20% in the U.K. -- think it's "too much"; 21% of Spanish office workers -- compared to 13% on average -- think it's "too little."

Computer Use

Distributed electronic processing is widespread in offices throughout the EEC with four in five office workers reporting they use a PC or terminal (Table 3-11). Computer use is highest in the U.K. (84%) and France (82%) and only marginally lower in Germany and Spain (both 77%). One in five (21%) throughout the EEC report using a terminal or PC five or more hours per day; this proportion is highest in the U.K. (24%) and Spain (23%), a slightly lower 20% in France, and 16% in Germany.

Three in five (59%) of EEC top executives report they have a terminal or PC in their office, including 68% in Spain, 60% in both France and Germany, and 55% in the U.K. (Table 3-12). Almost half (44%) of top executives in the U.K. say they do not have a PC or terminal in their office.

Innovative Work Arrangements

As the aspiration gap data reveal, office workers in the EEC express frustration on management sensitivity to the need to balance family and work life. The OEI asked office workers how important various innovative work arrangements (which might make the balancing act easier) are to them and to what extent they find such arrangements in the jobs they have now (Table 3-13). "Flexible hours" is the only one of the six innovative arrangements tested which a majority of office workers in the EEC report is currently offered by their employer. But the fact is that EEC office workers do not attach great importance to most of these arrangements; the proportion reporting their employer offers the arrangement is as large as or larger than the proportion deeming it "very important" for five of the six arrangements -- the exception being "financial support or facilities for child care offered by your employer." This pattern holds in two of the individual countries for which the OEI provides a separate reading: the U.K. and Germany. In France, there is no "unfulfilled demand" for child care, but in Spain -- because of higher attributed importance -- demand is unfulfilled for four of the six arrangements tested. In detail:

-- "Flexible hours that you can tailor to meet your needs" is rated as the most important accommodation by a majority of office workers in the EEC overall (57%), and an equal proportion (58%) say their employer offers this. In the U.K., France and Germany, such arrangements are so prevalent as to outstrip the demand; for example, fully 74% of German office workers say their employer offers flexible hours, yet only 68% say it is "very important" to them. Spain is the only country in which the demands of office workers remain unmet by employers; 59% say flexible hours are "very important" to them, yet only 39% say their employer offers them this option.

-- In the U.K., Spain and Germany, the demand for "financial support or facilities for child care offered by your employer" is unfulfilled, as substantial proportions of office workers say this is important, yet far fewer report their employer offers them such a program. In Spain in particular, the demand for such benefits is high; 63% of office workers say it is important to them in a job, compared to 43% in Germany, 38% in France and 35% in the U.K. The demand for some form of child care assistance is not unmet in France, as French office workers are most likely say their employer offers this to them (36%). In the EEC overall, 41% deem child care support "very important," while only 22% say it is now available to them.

-- "Flexible benefits that you can tailor to meet your needs" is far more important in Spain (60%) than in Germany (39%), the U.K. (32%) or France (21%). Employers most commonly offer flexible benefits to office workers in Spain (43%) and Germany (44%); in Germany, the availability of this item exceeds demand by office workers, while in Spain demand exceeds availability. In the EEC overall, demand (33%) and availability (32%) are equal.

-- Spanish workers strongly assert their desire for "the opportunity to do a job like yours part-time" (42%) compared to office workers in Germany (26%), France (16%) and the U.K. (15%). In all countries except Spain, availability exceeds office worker demand. In the EEC overall, 21% deem this "very important," while 38% say it is available.

-- "The opportunity to spend a portion of normal office hours working at home rather than in your office" is least important to French office workers and most important to those in Germany. The ability to work at home is most commonly found in the U.K., and in the U.K., France and Germany this benefit is offered more often than demand dictates. About the same proportion of EEC office workers overall deem this "very important" (17%) as report their employer offers it (20%).

-- Finally, "an arrangement in which you actually split hours with someone else, sometimes known as job sharing" is most important to German and Spanish office workers, and offered most often in Germany, the U.K. and France. In those three countries, fewer office workers say such a program is very important to them than say their employers offer it to them. Overall, 16% of EEC office workers deem this "very important," while 22% say it is available.

Table 3-14 shows the importance and prevalence of these innovative arrangements among office workers with children under the age of 12 living in the household (31% of all office workers across the EEC). This subpopulation, not surprisingly, attaches somewhat more importance than do EEC office workers overall to flexible hours, support for child care, the opportunity to work at home, and job sharing. Again, office workers in this category in France, Germany and the U.K. are more apt to report their employer offers innovative arrangements such as flexible hours, the opportunity to do a job part-time and job sharing than office workers are to say they are important. Consistently, the demand for innovative arrangements is highest in Spain; according to office workers in that country, employers have yet to meet their need for flexible arrangements -- especially for child care support.

Of the 31% of office workers across the EEC as a whole who report children under 12 in their household, 55% are married with their spouse employed full-time, 16% married with their spouse employed part-time, 2% married with their spouse unemployed, and 17% married with their spouse not employed but not looking for work (presumably a homemaker). Totalling just those who report a spouse employed full- or part-time, this means that at least seven in ten EEC office workers with children under 12 in the household, or over one in five EEC office workers overall, may need to make some kind of child care arrangements (Table 3-15).

Like EEC office workers, EEC top executives are more likely to report they offer employees flexible hours than to report they offer any of the other six arrangements tested. Spanish top executives are less likely than their counterparts in France, Germany, and the U.K. to say they offer job sharing, flexible hours, part-time work and the chance to work at home, though they are more likely to say they offer financial support or facilities for child care and flexible benefits (Table 3-16). German executives say they are most likely to offer flexibility in the workplace itself, as evidenced in higher proportions who say they offer flexible hours, job sharing and part-time work to their employees.

Observation:

For the most part, office workers and management are in agreement about supporting TQM initiatives. Though variations between the two groups occur on some measures (most notably, measuring customer satisfaction), both executives and office workers express remarkably high levels of enthusiasm. Though large proportions of both groups report the implementation of such initiatives in their workplace, the strong support TQM enjoys should encourage the application of TQM measures on an even more extensive basis. It is, however, interesting to note the relatively low level of support and implementation TQM measures receive in Germany, especially among top executives.

Child care support is the one innovative work arrangement tested for which "demand" by office workers greatly exceeds "supply" in the form of financial aid or facilities offered by employers. A sizable minority of EEC office workers may need to make child care arrangements.

OW-Q.16a, 16b

Table 3-1

DEGREE OF INITIATIVE: EEC OFFICE WORKERS

	Office Workers									
	EEC Total		U.K.		France		Germany		Spain	
Base	1449		250		248		251		250	
	Best Describes %	Prefer %	Best Describes %	Prefer %	Best Describes %	Prefer %	Best Describes %	Prefer %	Best Describes %	Prefer %
You're pretty much told what to do and how to do it	10	4	9	5	6	3	9	2	14	3
You're given a problem to solve or a goal to achieve, and you figure out what to do and how to do it	37	35	30	29	43	33	32	30	38	42
You identify problems or goals, and get them solved or achieved	36	45	50	55	41	55	32	44	29	37
Combination	17	14	11	9	10	8	27	23	18	15
Not sure	*	1	-	2	-	1	-	1	*	2

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*Less than 0.5%.

OW-Q.16a

Table 3-2

DEGREE OF INITIATIVE: EEC OFFICE WORKERS BY JOB LEVEL

		Job Level	
	EEC Total	Managerial	Non-Managerial
Base	1449	455	994
	%	%	%
You're pretty much told what to do and how to do it	10	3	13
You're given a problem to solve or a goal to achieve, and you figure out what to do and how to do it	37	27	41
You identify problems or goals, and get them solved or achieved	36	52	29
Combination	17	18	17
Not sure	*	*	*

---

*Less than 0.5%.

Q.17

Table 3-3

PROPORTION OF WORK WEEK SPENT WORKING ALONE, ON FORMAL TEAMS, OR INFORMALLY WITH OTHERS: EEC OFFICE WORKERS

	Office Workers				
	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250
Mean % Time Working:					
Alone	54	56	55	52	53
Informally with others	22	18	22	25	19
On formal teams	24	26	23	23	28

OW-Q.4, 5

Table 3-4

TQM INITIATIVES: EEC OFFICE WORKERS

	Office Workers									
	EEC Total		U.K.		France		Germany		Spain	
Base	1449		250		248		251		250	
	Does %	Favor %	Does %	Favor %	Does %	Favor %	Does %	Favor %	Does %	Favor %
Foster the notion of "continuous improvement" of the work and the way things are done in the office	65	91	79	93	64	87	58	89	64	95
Measure the satisfaction of your office's customers or clients, either external or within the organization	56	85	65	91	70	86	41	76	72	95
Measure office worker productivity	41	60	45	69	51	48	30	49	45	72
Have a "do-it-right-the-first-time" philosophy for office work	40	59	56	68	48	59	19	39	53	74
Offer its office workers incentive compensation linked to the quality of their work	32	79	30	82	39	76	38	85	22	73
Offer its office workers incentive compensation linked to the quantity of their work	24	60	21	60	32	57	30	64	18	63

CEO-Q.5a, 5b

Table 3-5

TQM INITIATIVES: EEC TOP EXECUTIVES

	Top Executives									
	EEC Total		U.K.		France		Germany		Spain	
Base	518		102		103		103		103	
	Organization Does %	Would Favor %	Organization Does %	Would Favor %	Organization Does %	Would Favor %	Organization Does %	Would Favor %	Organization Does %	Would Favor %
Foster the notion of "continuous improvement" of the work and the way things are done in the office	83	97	95	100	83	95	76	93	83	98
Measure the satisfaction of your office's customers or clients, either external or within the organization	54	87	71	93	74	91	24	61	95	96
Have a "do-it-right-the first time philosophy for office work	47	72	66	91	56	77	26	43	67	80
Offer its office workers incentive compensation linked to the quality of their work	45	82	32	71	66	87	48	87	38	79
Measure office worker productivity	27	67	25	64	47	75	17	60	35	68
Offer its office workers incentive compensation linked to the quantity of their work	34	64	22	51	50	68	35	68	33	67

OW-Q.4

Table 3-6

ORGANIZATION HAS IMPLEMENTED TQM INITIATIVES:
EEC OFFICE WORKERS BY TYPE OF ORGANIZATION

	EEC	Type of Organization		
	Total	Manu-facturing	Service	Government
Base	1449	383	646	377
	%	%	%	%
Foster the notion of "continuous improvement" of the work and the way things are done in the office	65	68	68	57
Measure the satisfaction of your office's customers or clients, either external or within the organization	56	57	63	41
Measure office worker productivity	41	32	46	38
Have a "do-it-right-the-first-time" philosophy for office work	40	46	44	31
Offer its office workers incentive compensation linked to the quality of their work	32	35	35	22
Offer its office workers incentive compensation linked to the quantity of their work	24	22	26	21

OW-Q.3b; CEO-Q.3b;
FM-Q.4; ID-Q.3b

Table 3-7

PRODUCTIVITY: WHETHER OFFICE WORKERS DO AS MUCH AS THEY CAN: EEC OFFICE WORKERS AND EXECUTIVES

	Office Workers					Top Executives Answering About Their Employees				
	EEC Total	U.K.	France	Germany	Spain	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250	518	102	103	103	103
	%	%	%	%	%	%	%	%	%	%
Certainly do as much as can	48	58	43	41	36	16	18	16	13	17
Probably do as much as can	25	15	32	26	31	41	54	38	35	38
Could probably do more	26	26	24	32	32	43	28	45	50	46
Not sure	1	1	1	1	1	1	-	2	3	-

	Facilities Managers Answering About Their Employees					Interior Designers Answering About Most Office Employees			
	EEC Total	U.K.	France	Germany	Spain	U.K.	France	Germany	Spain
Base	507	102	100	100	101	91	80	81	84
	%	%	%	%	%	%	%	%	%
Certainly do as much as can	20	30	16	16	7	5	4	6	4
Probably do as much as can	37	41	40	35	48	29	21	27	26
Could probably do more	40	25	37	45	43	62	61	60	33
Not sure	3	3	7	4	3	4	14	6	37

OW-Q.F4a, F4b

Table 3-8

HOURS WORKED IN TYPICAL WEEK: EEC OFFICE WORKERS

	Office Workers				
	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250
Median hours work per week	40	38	39	40	40
	%	%	%	%	%
Consider that:					
Too much	31	23	31	38	37
Too little	3	1	5	4	1
Just right	66	74	62	58	62

OW-Q.F4a, F4b

Table 3-9

HOURS WORKED IN TYPICAL WEEK: EEC OFFICE WORKERS BY JOB LEVEL

	EEC	Job Level	
	Total	Managerial	Non-Managerial
Base	1449	455	994
Median hours work per week	40	45	39
	%	%	%
Consider that:			
Too much	31	36	28
Too little	3	3	3
Just right	66	59	69

OW-Q.F4c, F4d

Table 3-10

HOURS SPENT PER WEEK IN MEETINGS: EEC OFFICE WORKERS

	Office Workers				
	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250
Median hours per week in meetings	2	2	2	4	3
	%	%	%	%	%
Consider that:					
Too much	14	20	12	13	7
Too little	13	9	10	12	21
Just right	63	69	60	64	62
Not sure	10	2	17	12	10

OW-Q.15a, 15b

Table 3-11

USE OF TERMINALS AND PCs: EEC OFFICE WORKERS

	Office Workers				
	EEC Total 1449 %	U.K. 250 %	France 248 %	Germany 251 %	Spain 250 %
Total PC/Terminal Use	80	84	82	77	77
Use PC	26	22	27	27	32
Use terminal	23	26	22	23	22
Use both a terminal and a PC	22	18	30	16	16
Use equipment that serves as both a terminal and a PC	9	17	3	11	7
Don't use	20	17	16	23	23
Use 5+ hours/day	21	24	20	16	23
Median hours/day	3	3	3	3	3

CEO-Q.F5

Table 3-12

HAVE TERMINAL OR PC IN OFFICE: EEC TOP EXECUTIVES

	Top Executives				
	EEC Total	U.K.	France	Germany	Spain
	518	102	103	103	103
	%	%	%	%	%
Total PC/Terminal in Office	59	55	60	60	68
Have PC	21	23	24	16	29
Have terminal	14	20	11	16	22
Have both (vol.)	24	13	25	29	17
Don't have	39	44	37	37	30

OW-Q.6a, 6b

Table 3-13

IMPORTANCE AND PREVALENCE OF INNOVATIVE WORK ARRANGEMENTS: EEC OFFICE WORKERS

	Office Workers									
	EEC Total 1449		U.K. 250		France 248		Germany 251		Spain 250	
	Very Important %	Employer Offers %	Very Important %	Employer Offers %	Very Important %	Employer Offers %	Very Important %	Employer Offers %	Very Important %	Employer Offers %
Flexible hours that you can tailor to meet your needs	57	58	52	53	57	59	68	74	59	39
Financial support or facilities for child care offered by your employer	41	22	35	14	38	36	43	14	63	36
Flexible benefits that you can tailor to meet your needs	33	32	32	31	21	33	39	44	60	43
The opportunity to do a job like yours part-time	21	38	15	32	16	48	26	38	42	20
The opportunity to spend a portion of normal office hours working at home rather than in your office	17	20	17	26	9	20	19	20	17	14
An arrangement in which you actually split hours for a job with someone else, sometimes known as job sharing	16	22	12	25	15	24	21	28	20	17

OW-Q.6a, 6b

Table 3-14

IMPORTANCE AND PREVALENCE OF INNOVATIVE WORK ARRANGEMENTS: EEC OFFICE WORKERS WITH CHILDREN IN THE HOUSEHOLD

Base: Children under 12 in household

	Office Workers									
	EEC Total 1449		U.K. 250		France 248		Germany 251		Spain 250	
	Very Important %	Employer Offers %	Very Important %	Employer Offers %	Very Important %	Employer Offers %	Very Important %	Employer Offers %	Very Important %	Employer Offers %
Flexible hours that you can tailor to meet your needs	60	60	56	65	62	68	64	72	61	4[illegible]
Financial support or facilities for child care offered by your employer	45	17	45	12	37	29	36	4	74	34
Flexible benefits that you can tailor to meet your needs	34	31	35	25	22	40	28	54	67	43
The opportunity to spend a portion of normal office hours working at home rather than in your office	22	21	24	26	13	25	27	27	19	9
The opportunity to do a job like yours part-time	21	38	17	36	14	43	19	34	41	23
An arrangement in which you actually split hours for a job with someone else, sometimes known as job sharing	19	23	17	31	15	25	15	30	20	14

OW-Q.F9a, F9b

Table 3-15

MARITAL STATUS OF EEC OFFICE WORKERS WITH CHILDREN UNDER 12 IN HOUSEHOLD

	Have Children Under 12 in Household
Base	475
	%
Divorced/separated/widowed	4
Single/never married	4
Married, spouse employed full-time	55
Married, spouse employed part-time	16
Married, spouse unemployed	2
Married, spouse not employed but not looking for work	17

CEO-Q.6

Table 3-16

PREVALENCE OF INNOVATIVE WORK ARRANGEMENTS: EEC TOP EXECUTIVES

	Top Executives				
	EEC Total	U.K.	France	Germany	Spain
Base	518	102	103	103	103
	%	%	%	%	%
Flexible hours that they can tailor to meet their needs	71	66	83	87	38
The opportunity to do jobs at all levels part-time	51	36	51	79	23
An arrangement in which they actually split hours for a job with someone else, sometimes known as job sharing	34	48	16	59	9
Financial support or facilities for child care	33	24	27	18	44
Flexible benefits that they can tailor to meet their needs	23	16	19	29	42
The opportunity to spend a portion of normal office hours working at home rather than in the office	11	22	9	13	1

4: ENVIRONMENTAL, HEALTH AND SAFETY ISSUES

Protecting the Natural Environment

Office workers acknowledge the natural environment as a primary concern in the workplace, often overlooked by employers; the aspiration gap data in Chapter 2 reveals a substantial lack of fulfillment on this issue among office workers in the EEC overall and in all four EEC countries that can be analyzed separately -- the highest gap being shown in Spain.

EEC office workers overwhelmingly support a recycling program in the workplace; 95% of those in the EEC as a whole, including 92% in Spain and France, 97% in the U.K. and fully 99% of German office workers say they favor a recycling program in the office (Table 4-1). When asked if their organization has such a program, 55% of office workers across the EEC report it has, with varying degrees of implementation by country -- from a high of 79% in Germany and a lower 63% in the U.K. to a much lower 23% in Spain and 22% in France. Top executives tend to understand office workers' support for recycling programs: 92% overall believe most employees would favor such a program, including 83% in Spain, 84% in France, 95% in the U.K., and 96% in Germany. Top executives corroborate the reports of office workers on implementation of such programs.

Health and Safety Issues

As will be seen in the next chapter, health and safety regulations and legislation are expected to have a substantial impact on office facilities design by majorities of EEC facilities managers and interior designers (although by only a minority of top executives). To what extent are office workers in favor of bringing health issues into the workplace, and to what extent do organizations currently provide health-related programs and information to their employees?

In Europe as a whole, only a minority of office workers report their organizations currently offer such policies, despite support from office workers. Just over one-third (35%) of office workers in Europe say their organization currently has "a program promoting good health habits," though fully 84% favor a corporate program of this type (Table 4-2). A program promoting good health habits is most commonly offered in the U.K. (51% of office workers say their organizations provide them with such a program), offered less commonly in Germany (42%) and Spain (41%), and is least likely to be offered in France (26%). A clear majority of office workers in Spain (96%), Germany (89%), and the U.K. (88%) say they are in favor of this type of program, while a lesser 67% of French office workers report their support. "Providing employees with information about the impact of AIDS in the workplace" is more likely to be found in the U.K. (35%) than in France (20%), Germany (18%) or Spain (10%); a majority of office workers in all four countries say they are in favor of this program (74% in Spain, 71% in the U.K., 61% in Germany and 57% in France). Few organizations in Germany (28%), France (21%), the U.K. (16%) and Spain (11%) are reported by office workers to have "an alcohol or drug abuse treatment program" for their employees, despite strong support from office workers (fully 89% in Spain, 77% in Germany, 75% in the U.K. and 62% in France). Very few office workers report that their organization does any form of drug testing; "requiring pre-employment drug testing for new hires" is most likely to be found in Germany, though less than one in ten office workers say their organization does so now (9%), dropping to 5% of office workers in the U.K., 3% in Spain and a mere 1% in France. Office workers show more support for this measure than these figures depict in Spain (48% favor), the U.K. (42% favor) and Germany (34%

favor); French office workers stand out as being least likely to support drug testing for new hires (19% favor). Similar low proportions of office workers in all four countries (less than one in ten) say their organizations "require drug testing for current employees," and French office workers are again least likely to offer support for such a policy.

Screening prospective employees for AIDS is also infrequently enacted in the U.K., France or Germany; it is most likely a part of the workplace in Spain, where it also receives the most support, and is least commonly done or supported in France.

Across the EEC as a whole, the likelihood of reporting implementation of these policies tends to increase with the size of the employee's organization (Table 4-3). While programs for promoting good health habits, informing employees about AIDS in the workplace, and treating substance abuse are generally favored by office workers of all ages, support for drug testing and AIDS screening is highest among the oldest workers and lowest among those 30-39 year of age (Table 4-4).

Substantial proportions of top executives favor programs promoting good health habits, having an alcohol or drug abuse treatment program and providing employees with information about AIDS; drug testing of current or prospective employees and screening prospective employees for AIDS are far less popular (Table 4-5). Executives in the U.K. are more likely to say their organization currently has a health program and provides employees with information about AIDS than executives in other countries, and alcohol/drug abuse programs, according to top executives, are most likely to be currently offered in Germany.

Table 4-6 presents a series of potential health hazards associated with the workplace and office worker response to the seriousness of each hazard.

Eyestrain is deemed as the most serious hazard (51% say it at least "somewhat serious") by EEC office workers overall; 63% in France, 61% in Spain, 46% in the U.K. and 39% in Germany say this problem is "very" or "somewhat" serious. The quality of the air you breathe is a serious concern to 39% of EEC office workers overall and elicits greater concern in France (43%), Spain (42%) and the U.K. (40%) than in Germany (29%), while potential harmful radiation from video display terminals (VDTs) -- seen as a serious hazard by 33% of EEC office workers overall -- is a greater concern among Spanish office workers (45%) than among office workers in France (33%), the U.K. (31%) and Germany (24%). Only 17% of office workers in the EEC overall say the risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard is a very or somewhat serious concern (22% in Spain, 18% in Germany and the U.K. and 13% in France). Again, only 17% in the EEC overall view exposure to hazardous material in your building as a serious concern (12% in Germany, rising to 15% in the U.K., 17% in France and 19% in Spain).

EEC office workers who report they use a PC or terminal five or more hours per day are somewhat more likely to say that the risk of repetitive strain injury is a serious problem (24%) than European office workers in general (16%).

As will be shown in Chapter 6, top executives, facilities managers and interior designers acknowledge the impact health and safety legislation and regulations will have on design in the next few years. Yet, when asked how much of a problem various health hazards in the workplace are for their office workers, top executives underestimate the seriousness their employees perceive for all potential hazards (Table 4-7). Top executives come closest to anticipating their workers' concerns over repetitive strain injury, and underestimate most severely the threats from air quality, eyestrain and radiation from VDTs. Facilities managers more closely understand the concerns of the office worker, though they too underestimate the seriousness with which office workers view air quality, radiation from VDTs and eyestrain (Table 4-8). Interior designers, on the other hand, consistently perceive the seriousness presented by eyestrain, air quality and repetitive strain injury to be much higher than do office workers (Table 4-9).

Observation:

As the gap data reveal, concern over the natural environment has invaded the consciousness of individuals the world over, not just in the home but in the workplace as well. Though recycling programs are favored by nearly all office workers in the EEC, organizations in the U.K. and Germany are light years ahead of those in France and Spain in adopting recycling measures. But huge majorities of top executives in France and Spain are well aware that their employees favor recycling.

The evidence also reveals that health programs and policies are far less likely to be implemented than office workers would like, as greater proportions of workers favor these policies than say their organization currently pursues them. Furthermore, only a minority (albeit a substantial one) of top executives believe health and safety regulation and legislation will greatly impact facilities design over the next few years, and they tend to downplay the seriousness of specific health hazards for their office workers.

OW-Q.8a, 8b;
CEO-Q.8a, 8b

Table 4-1

RECYCLING PROGRAM: EEC OFFICE WORKERS AND TOP EXECUTIVES

	EEC Total %	U.K. %	France %	Germany %	Spain %
Office Workers					
(Base)	(1449)	(250)	(248)	(251)	(250)
Organization has program	55	63	22	79	23
Favor	95	97	92	99	92
Top Executives					
(Base)	(518)	(102)	(103)	(103)	(103)
Organization has program	61	71	35	85	28
Most employees would favor	92	95	84	96	83

OW-Q.8a, 8b

Table 4-1

HEALTH AND SAFETY POLICIES: EEC OFFICE WORKERS

	Office Workers									
	EEC Total		U.K.		France		Germany		Spain	
Base	1449		250		248		251		250	
	Does	Favor	Does	Favor	Does	Favor	Does	Favor	Does	Favor
	%	%	%	%	%	%	%	%	%	%
Have a program for promoting good health habits	35	84	51	88	26	67	42	89	41	96
Provide employees with information about the impact of AIDS in the workplace	20	67	35	71	20	57	18	61	10	74
Have alcohol or drug abuse treatment program	17	74	16	75	21	62	28	77	11	89
Require pre-employment drug testing for new hires	6	40	5	42	1	19	9	34	3	48
Screen prospective employees for AIDS	5	33	5	30	2	14	4	25	11	65
Requires drug testing for current employees	3	37	2	37	1	19	7	35	2	47

OW-Q.8a

Table 4-3

HEALTH AND SAFETY POLICIES: EEC OFFICE WORKERS BY SIZE OF ORGANIZATION

("Does")

		Size of Organization			
	EEC Total	100 or Less	101-500	501-5000	Over 5000
Base	1449	165	222	378	390
	%	%	%	%	%
Have a program for promoting good health habits	35	16	27	38	49
Provide employees with information about the impact of AIDS in the workplace	20	10	13	22	29
Have alcohol or drug abuse treatment program	17	5	7	15	28
Require pre-employment drug testing for new hires	6	2	6	6	6
Screen prospective employees for AIDS	5	6	3	3	6
Requires drug testing for current employees	3	2	2	4	5

OW-Q.8b

Table 4-4

HEALTH AND SAFETY POLICIES: EEC OFFICE WORKERS BY AGE

("Favor")

	EEC Total	Age 18-29	30-39	40-49	50+
Base	1449	346	465	382	219
	%	%	%	%	%
Have a program for promoting good health habits	84	81	86	85	83
Provide employees with information about the impact of AIDS in the workplace	67	69	67	65	68
Have alcohol or drug abuse treatment program	74	75	73	78	70
Require pre-employment drug testing for new hires	40	40	33	44	50
Screen prospective employees for AIDS	33	31	28	36	46
Requires drug testing for current employees	37	37	31	40	45

CEO-Q.8a, 8b

Table 4-5

HEALTH AND SAFETY POLICIES: EEC TOP EXECUTIVES

	Top Executives									
	EEC Total		U.K.		France		Germany		Spain	
Base	518		102		103		103		103	
	Does	Employee Favors	Does	Employee Favors	Does	Employee Favors	Does	Employee Favors	Does	Employee Favors
	%	%	%	%	%	%	%	%	%	%
Have program for promoting good health habits	62	86	81	95	53	78	71	89	71	97
Have an alcohol or drug abuse treatment program	38	70	46	73	22	54	68	83	25	79
Provide employees with information about the impact of AIDS in the workplace	37	57	69	76	32	48	38	52	10	52
Require pre-employment drug testing for new hires	11	24	13	22	1	6	13	22	16	43
Requires drug testing for current employees	6	18	4	15	1	5	11	17	13	29
Screen prospective employees for AIDS	5	20	8	25	2	4	1	5	14	43

OW-Q.7

Table 4-6

HAZARDS IN OFFICE WORKPLACE: EEC OFFICE WORKERS

"Very" or "Somewhat Serious"

	Office Workers				
	EEC Total 1449 %	U.K. 250 %	France 248 %	Germany 251 %	Spain 250 %
Eyestrain	51	46	63	39	61
The quality of the air you breathe	39	40	43	29	42
Potential harmful radiation from video display terminals	33	31	33	24	45
The risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard	17	18	13	18	22
Exposure to hazardous material in your building	17	15	17	12	19

CEO-Q.7

Table 4-7

HAZARDS IN OFFICE WORKPLACE: EEC TOP EXECUTIVES

"Very" or "Somewhat Serious"

	Top Executives				
	EEC Total 518 %	U.K. 102 %	France 103 %	Germany 103 %	Spain 103 %
Eyestrain	31	27	24	24	33
The quality of the air you breathe	17	26	10	8	10
Potential harmful radiation from video display terminals	16	13	6	17	27
The risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard	11	25	1	16	8
Exposure to hazardous material in your building	9	6	7	3	2

FM-Q.5

Table 4-8

HAZARDS IN OFFICE WORKPLACE: EEC FACILITIES MANAGERS

"Very" or "Somewhat Serious"

	Facilities Managers				
	EEC Total 507 %	U.K. 102 %	France 100 %	Germany 100 %	Spain 101 %
Eyestrain	41	40	53	33	45
The quality of the air you breathe	24	29	35	10	15
Potential harmful radiation from video display terminals	21	12	25	21	21
The risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard	15	28	3	22	7
Exposure to hazardous material in your building	12	10	16	7	3

ID-Q.4

Table 4-9

HAZARDS IN OFFICE WORKPLACE: INTERIOR DESIGNERS IN U.K., FRANCE, GERMANY, SPAIN

"Very" or "Somewhat Serious"

	Interior Designers			
	U.K. 91 %	France 80 %	Germany 81 %	Spain 84 %
Eyestrain	76	79	75	46
The quality of the air you breathe	73	62	55	41
The risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard	49	12	39	26
Potential harmful radiation from video display terminals	33	45	44	48
Exposure to hazardous material in your building	22	34	44	24

5: HOW THE PHYSICAL ENVIRONMENT SUPPORTS THE OFFICE WORKER

Usual Workspace Arrangements

In addition to examining management policies and attitudes towards its workers (and office workers perceptions of such), the *OEI* also examines the physical environment of the workplace itself. European office workers are more likely to work in a "private office with a door" (51%), than in "a partitioned space divided with screens or panels that's part of a so-called open plan system" (17%) or "open space" (31%) (Table 5-1). The high proportion saying they have a private office may be result of cultural differences in the definition of what "private" means, as 29% of EEC office workers actually share a "private office" with others, while only 22% report that they are the sole occupant of such a space. The use of private offices, whether as sole occupant or on a shared basis, is highest in Germany, as fully 75% of office workers say they have a private office; however, 46% report they share this space with someone else. Nevertheless, Germany ranks as the top location for private office space in which the worker is the sole occupant (29%). In France, 48% of office workers report they have a private office, with 25% saying they are the sole occupant and 23% reporting they share their private office with others. Thirty-eight percent of office workers in Spain say they have a private office; 21% say they are the only occupant and 17% share it with others. Office workers in the U.K. report a lower likelihood of private offices on a single-occupant basis (19%), while 18% say they share their office. Partitioned space is more likely to be found in Spain (26%) than in France (18%), the U.K. (14%) or Germany (9%). Open space without partitions is, according to office workers, a common feature of office design in the U.K. (49%), less so in Spain (35%) and France (33%), and least common in Germany (15%).

Facilities managers report layouts of office space similar to office workers; private offices (shared or otherwise) predominate in Germany (70%) and France (61%), and are less common in the U.K. (33%) and Spain (31%), where open space accounts for a larger proportion of office layout (Table 5-2). Partitioned space accounts for roughly the same proportion of office space in the U.K. (25%), France (21%) Spain (22%) and Germany (18%). In the next five years, facilities managers anticipate little change, though partitioned space is expected to become more common in the U.K. and Spain.

When asked how the office facilities planned by their firm in 1990 were designed, interior designers report higher proportions of space allocated to partitioned space in all four countries, with less open space in the U.K. and Spain (Table 5-3). Over the next five years, interior designers expect even greater usage of partitions.

Standards Programs and Choice in Workspace Details

A majority of office workers in the EEC (54%) -- including majorities in Germany (62%), Spain (59%) and France (57%) -- report their job entitles them to specific furniture, workspace or accessories; the corresponding proportion in the U.K. is 46% (Table 5-4). Overall, 28% of EEC office workers say this is a formal policy of their organization, while a higher 65% would favor a formal standards program. In France, 33% say they have a formal standards program, and 39% favor such a program. Thirty-two percent of office workers in Germany say their company has a formal program, where it is most strongly supported (fully 80% favor); in the U.K. 28% say this is the result of a formal program, with 63% in favor, and in Spain 27% say their company has a formal program, with 61% in favor.

Across the EEC, office workers in larger organizations are more likely than those in smaller ones both to report their job entitles them to certain types of workspace, furniture, and accessories and to assert that this is the result of a formal policy (Table 5-5). But office workers in smaller organizations are more likely than their counterparts in larger ones to favor formal standards programs.

Nearly two-thirds (64%) of EEC facilities managers report their organizations have standards programs. According to facilities managers, Germany leads the way in this regard (85%), followed by Spain (69%), France (58%), and the U.K. (53%) (Table 5-6). Most facilities managers in Germany (76%), the U.K. (59%) and France (53%) think the employees of their organization would favor a standards program; only 45% of those in Spain say the same thing.

Fewer than half of interior designers in Germany (46%), France and the U.K. (44%) and Spain (38%) say that "practically all" of their clients have a standards program (Table 5-7). In the U.K., as many as 64% of designers think most of their clients' employees would favor a standards program, but that figure is a lower 49% of designers in France, 43% in Germany, and 30% in Spain.

In the EEC as a whole, the U.K., France and Spain office workers are almost evenly divided when asked if they have any choice in the details of their workspace -- 53% of EEC office workers say they have some choice (47% have none), 43% of those in the U.K. say they have "some choice" (56% say they have none), 52% of those in France say they have choice (48% have none), and 58% of office workers in Spain say they have some choice (while 40% say they have no choice) (Table 5-8). In Germany, office workers are more likely to have some choice (77%) than not (22%). Similarly, facilities managers in Germany agree that workers are more apt to have a choice (76% vs. 24%); the same is true in France (66% vs. 34%). However, in the U.K. (49% vs. 51%) and Spain (42% vs. 58%), workers are more likely to have no choice at all.

Interior designers in Germany acknowledge the greater freedom permitted office workers in that country; 48% say that "practically all" of their clients allow employees some choice, while a lower 30% of interior designers in France say that almost all of their clients permit their employees some choice, dropping to an an even lower 13% in the U.K. and 11% in Spain (Table 5-9).

Specific Features of the Workspace

The findings reveal a considerable shortfall between office workers' expectations for their personal workspace and the reality they confront in the office every day. Table 5-10 arrays the proportion of office workers who say each of eight items is "very important" to being able to do as much as they can and those who say it is "very true" for them in the office they now have. The corresponding aspiration gaps are arrayed in Table 5-11.

-- Proper lighting is acknowledged by office workers throughout the EEC as being a key feature of the workplace; it is considered "very important" to office workers' ability to do as much as they reasonably can by 81% overall, including 90% in Spain, 87% in the U.K., 86% in Germany, and 63% in France. A lower 50% overall, including 58% in Spain and Germany, 44% in the U.K., and 38% in France say this is "very true" of their own workspace.

-- 77% of EEC office workers -- including 89% in Germany, 88% in Spain, 78% in the U.K. and 57% in France -- say a comfortable chair that can be adjusted to your needs is "very important" to being able to do as much as they can; 50% in the EEC overall including 64% in Germany, 53% in Spain, 48% in the U.K., and 43% in France say this is "very true" for them.

-- Comfortable heating and air conditioning where you work is important to 72% of EEC office workers overall -- including 79% in Germany, 78% in Spain, 75% in the U.K. and 55% in France. It is "very true" for 37% overall, including 51% in Spain, 46% in Germany, 31% in France, and 29% in the U.K.

-- 63% of EEC office workers overall -- including 76% in Germany, 70% in Spain, 66% in the U.K. and 46% in France -- say enough worksurface space to display or spread out work is very important to them; 40% overall, including 55% in Germany, 39% in Spain, 37% in the U.K., and 35% in France say this is "very true" of their workspace.

-- Adequate storage and file space -- "very important" to 57% overall -- is most likely to be viewed as such in Spain (78%), followed by Germany (59%), the U.K. (58%) and France (46%). With 32% in the EEC overall saying it is "very true" of their own workspace, it is most likely to be reported so in Germany (46%), followed by Spain (38%), the U.K. (27%), and France (24%).

-- Enough privacy and quiet is "very important" to 56% in the EEC overall, including 68% of those in Germany, 63% in Spain, 50% in the U.K. and 42% in France. It is "very true" for 25% overall, including 32% in Germany, 24% in France, and 20% in Spain and the U.K.

-- 51% of EEC office workers overall, including 64% in Germany, 53% in the U.K., 51% in Spain and 39% in France say an office or work area close to people you work with on a regular basis is "very important," while 43% overall, including 50% of those in the U.K. and Germany, followed by Spain (38%) and France (33%) say it is "very true."

-- Finally, adequate meeting space in or near your office or workspace is viewed as "very important" by 45% overall, including 59% of Germans, 44% of those in the U.K., 43% of Spaniards and 25% of the French. It is "very true" for 36% overall, including 50% of those in Germany, 34% in the U.K., 26% in Spain, and 22% in France.

Across the EEC, non-managerial office workers show wider gaps than managerial-level employees on having a comfortable chair and sufficient worksurface space (Table 5-12). Heavy computer users (5 or more hours a day) show wider gaps than average on comfortable HVAC and a comfortable chair.

Facilities managers in Germany and France come closest to understanding the frustrations of the office worker as they confront the limitations of their workspace, while those in the U.K. and Spain are most removed from the views of the office worker. Table 5-13 illustrates the degree of importance facilities managers think office workers place on workspace features, and the extent to which they think these features are true:

-- Facilities managers across the EEC overall underestimate the gap shown by office workers on having a comfortable chair, comfortable HVAC, and enough privacy and quiet.

-- Facilities managers in the U.K. underestimate the gap shown by office workers on proper lighting, comfortable heat and air conditioning, having enough worksurface space to spread out work, adequate file or storage space, and having adequate meeting space near your office, and they most seriously underestimate the gaps expressed on having a comfortable chair and having enough privacy and quiet. They overestimate the gap for having an office near other people you work with.

-- In France, facilities managers come extremely close to anticipating the extent of office worker frustration. They slightly overestimate the gaps on adequate file and storage space, proper lighting and having a comfortable chair.

-- German facilities managers are more likely to overestimate the gap office workers experience -- proper lighting, a comfortable chair, adequate file or storage space, an office near those you work with and adequate meeting space are regarded as more of a problem for office workers than is in fact the case. Facilities managers underestimate the gaps on comfortable heat and air conditioning, enough worksurface space, and enough privacy and quiet, though by only a few percentage points.

-- Spanish facilities managers consistently fail to anticipate the needs of office workers, underestimating the gap for every workspace feature; the most egregious misconceptions occur on adequate file and storage space, an office close to those you work with, enough privacy and quiet and adequate meeting space near your office.

Interior designers in the U.K., Germany, France and Spain tend to express far wider aspiration gaps for most workspace features than do office workers (Table 5-14). In the U.K., however, designers underestimate the gap shown by office workers for privacy and quiet; they come closest to understanding workers needs on adequate file and storage space. French designers correctly anticipate office workers frustrations on privacy and quiet and comfortable heat and air conditioning. In Spain, designers overestimate the gap on privacy and quiet, and come closest to the mark on worksurface space and meeting space. German designers are least likely to understand the gaps of office workers, overestimating by substantial proportions the level of frustration expressed by their office workers.

Common Facilities

According to office workers, Germany is most apt to offer the best-equipped office space when it comes to common facilities (Table 5-15). "Areas specifically set aside for training" are reported to be offered by 59% of EEC office workers. This is the only type of facility measured for which Germany does not lead the way in the proportion of office workers who say their organization's facilities include such space; 69% of French office workers say their organization has specific training areas, followed by Germany and the U.K. (both with 63%), and Spain at a much lower 41%. "Rooms or other areas set aside for on-going work on specific projects" is reported to be included in the facilities of 60% of German office workers, 54% of French workers, 52% in Spain and 39% in the U.K. (and 50% of EEC office workers overall). In Germany, 54% say they have "areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally," dropping to a lower 40% in the U.K., 35% in France and 29% in Spain (the corresponding figure for the EEC is 42%). "Areas set aside for child care" are not part of the facilities offered office workers in the EEC or in any of the four countries; only 7% in France, 5% in the U.K., 4% in Spain and 3% in Germany (and 6% in the EEC overall) say their organization has child care areas.

Among EEC office workers overall, the likelihood of reporting their organization has training areas, special project rooms, and (at a much lower level of response) areas dedicated to child care increases with the size of the employee's organization (Table 5-16).

Facilities managers are more likely to say their organizations include all of these common facilities than are office workers (Table 5-17).

Observation:

Interior designers, on the cutting edge of the emerging office environment, predict an increase in the use of partitioned office space over the next five years. Almost none of this increase is at the expense of private offices with doors; in fact, open space is expected to diminish most substantially. Office workers, expressing frustration over privacy and quiet, can anticipate improvement in this area as office design moves toward partitions and away from open space.

In the U.K., Germany, Spain and France comfortable heat and air conditioning and proper lighting are sources of frustration for the office worker, acknowledged by both facilities managers and interior designers.

OW-Q.10, 11

Table 5-1

USUAL WORKSPACE ARRANGEMENT: EEC OFFICE WORKERS

	Office Workers				
	EEC Total 1449 %	U.K. 250 %	France 248 %	Germany 251 %	Spain 250 %
Private:	51	36	48	75	38
Share with others	29	18	23	46	17
Only occupant	22	19	25	29	21
Partitioned	17	14	18	9	26
Open with others	31	49	33	15	35
Other	1	*	*	1	1

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*Less than 0.5%.

FM-Q.7a, 7b

Table 5-2

OFFICE ARRANGEMENTS IN PLACE:
EEC FACILITIES MANAGERS

-- Mean Percentages --

	Facilities Managers				
	EEC Total	U.K.	France	Germany	Spain
	507	102	100	100	101
	%	%	%	%	%
Today:					
Private	53	33	61	70	31
Partitioned	20	25	21	18	22
Open	26	41	16	11	47
In 5 Years					
Private	53	30	62	73	26
Partitioned	23	32	23	18	30
Open	23	39	15	9	44

ID-Q.6a, 6b

Table 5-3

OFFICE ARRANGEMENTS IN PLACE: INTERIOR DESIGNERS

-- Mean Percentages --

	Interior Designers			
	U.K.	France	Germany	Spain
Base	91	80	81	84
	%	%	%	%
Today:				
Private	28	43	61	27
Partitioned	38	38	29	40
Open	32	17	8	33
In 5 Years				
Private	28	42	64	21
Partitioned	41	45	31	45
Open	31	13	5	34

OW-Q.12b, 12c, 12d

Table 5-4

STANDARDS PROGRAMS: EEC OFFICE WORKERS

	Office Workers				
	EEC Total 1449 %	U.K. 250 %	France 248 %	Germany 251 %	Spain 250 %
Job entitles them to certain types of workspace, furniture, accessories	54	46	57	62	59
Formal policy	28	28	33	32	27
Just works out	22	16	20	27	27
Both	2	-	2	3	5
Favor formal program	65	63	39	80	61
Oppose formal program	25	27	45	15	23

OW-Q.12b, 12c, 12d

Table 5-5

STANDARDS PROGRAMS: EEC OFFICE WORKERS: BY SIZE OF ORGANIZATION

		Size of Organization			
	EEC Total	100 or Less	101-500	501-5000	Over 5000
Base	1449	165	222	378	390
	%	%	%	%	%
Job entitles them to certain types of workspace, furniture, accessories	54	45	53	57	58
Formal policy	28	19	21	29	38
Just works out	22	22	28	25	16
Both	2	3	3	2	2
Favor formal program	65	74	67	60	62
Oppose formal program	25	19	21	27	28

FM-Q.8b,8c

Table 5-6

STANDARDS PROGRAMS:
EEC FACILITIES MANAGERS

	Facilities Managers				
	EEC Total	U.K.	France	Germany	Spain
Base	507	102	100	100	101
	%	%	%	%	%
Organization has standards program	64	53	58	85	69
Does not have	30	38	36	12	27
In some locations but not others	6	9	5	3	3
Not sure	*	-	1	-	1
Think Employees:					
Favor standards program	56	59	53	76	45
Oppose	26	24	33	11	11
Not sure	18	18	14	13	45

ID-Q.7b,7c

Table 5-7

STANDARDS PROGRAMS: INTERIOR DESIGNERS IN THE U.K., FRANCE, GERMANY, SPAIN

	Interior Designers			
	U.K.	France	Germany	Spain
Base	91	80	81	84
	%	%	%	%
Practically all clients have standards program	44	44	46	38
Only some	34	24	26	33
Practically none	21	26	25	23
Think most employees of clients would favor a standards program	64	49	43	30
Think most employees would oppose	27	29	27	29

OW-Q.12a; FM-Q.8a

Table 5-8

CHOICE IN WORKSPACE DETAILS: EEC OFFICE WORKERS AND FACILITIES MANAGERS

	Office Workers				
	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250
	%	%	%	%	%
Some choice	53	43	52	77	58
No choice	47	56	48	22	40
Not sure	1	1	-	1	2

	Facilities Managers				
	EEC Total	U.K.	France	Germany	Spain
Base	507	102	100	100	101
	%	%	%	%	%
Some choice	58	49	66	76	42
No choice	42	51	34	24	58
Not sure	-	-	-	-	-

ID-Q.7a

Table 5-9

CHOICE IN WORKSPACE DETAILS: INTERIOR DESIGNERS IN THE U.K., FRANCE, GERMANY, SPAIN

	Interior Designers			
	U.K.	France	Germany	Spain
Base	91	80	81	84
	%	%	%	%
Practically all clients allow employees some choice	13	30	48	11
Only some	45	25	36	21
Practically none	41	43	16	62

OW-Q.9a, 9b

Table 5-10

FEATURES OF WORKSPACE: EEC OFFICE WORKERS

	Office Workers									
	EEC Total		U.K.		France		Germany		Spain	
Base	1449		250		248		251		250	
	Very Important	Very True	Very Important	Very True	Very Important	Very True	Very Important	Very True	Very Important	Very True
	%	%	%	%	%	%	%	%	%	%
Proper lighting	81	50	87	44	63	38	86	58	90	58
A comfortable chair that can be adjusted to your needs	77	50	78	48	57	43	89	64	88	53
Comfortable heating and air conditioning where you work	72	37	75	29	55	31	79	46	78	51
Enough worksurface space to display or spread out work	63	40	66	37	46	35	76	55	70	39
Adequate storage and file space	57	32	58	27	46	24	59	46	78	38
Enough privacy and quiet	56	25	50	20	42	24	68	32	63	20
An office or work area close to people you work with on a regular basis	51	43	53	50	39	33	64	50	51	38
Adequate meeting space in or near your office or workspace	45	36	44	34	25	22	59	50	43	26

OW-Q.9a, 9b

Table 5-11

FEATURES OF WORKSPACE: ASPIRATION GAPS: EEC OFFICE WORKERS

	Office Workers				
	EEC Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250
Comfortable heating and air conditioning where you work	-35	-46	-24	-33	-27
Enough privacy and quiet	-31	-30	-18	-36	-43
Proper lighting	-31	-43	-25	-28	-32
A comfortable chair that can be adjusted to your needs	-27	-30	-14	-25	-35
Adequate storage and file space	-25	-31	-22	-13	-40
Enough worksurface space to display or spread out work	-23	-29	-11	-21	-31
Adequate meeting space in or near your office or workspace	-9	-10	-3	-9	-17
An office or work area close to people you work with on a regular basis	-8	-3	-6	-14	-13

OW-Q.9a, 9b

Table 5-12

FEATURES OF WORKSPACE: ASPIRATION GAPS: EEC OFFICE WORKERS BY JOB LEVEL AND HIGH COMPUTER USE

		Job Level		
	EEC Total	Managerial	Non-Managerial	Use Computer 5+ Hours/Day
Base	1449	455	994	307
Comfortable heating and air conditioning where you work	-35	-32	-36	-42
Enough privacy and quiet	-31	-30	-31	-32
Proper lighting	-31	-29	-33	-35
A comfortable chair that can be adjusted to your needs	-27	-19	-32	-37
Adequate storage and file space	-25	-22	-26	-30
Enough worksurface space to display or spread out work	-23	-14	-27	-28
Adequate meeting space in or near your office or workspace	-9	-11	-9	-9
An office or work area close to people you work with on a regular basis	-8	-5	-8	-4

FM-Q.6a, 6b

Table 5-13

FEATURES OF WORKSPACE: EEC FACILITIES MANAGERS

	Facilities Managers									
	EEC Total		U.K.		France		Germany		101	
Base	507		102		100		100		Spain	
	Very Important %	Very True %	Very Important %	Very True %	Very Important %	Very True %	Very Important %	Very True %	Very Important %	Very True %
Proper lighting	71	47	73	42	63	35	76	41	85	59
A comfortable chair that can be adjusted to your needs	68	50	62	50	64	44	81	55	72	45
Comfortable heating and air conditioning where you work	60	37	64	33	53	32	53	30	68	50
Adequate storage and file space	49	28	48	27	51	26	44	24	56	27
Enough worksurface space to display or spread out work	45	28	50	32	30	25	43	27	55	30
Enough privacy and quiet	39	17	27	14	35	20	40	10	43	11
An office or work area close to people you work with on a regular basis	37	27	44	33	28	24	43	21	34	31
Adequate meeting space in or near your office or workspace	31	24	35	34	13	11	38	24	21	14

ID-Q.5a, 5b

Table 5-14

FEATURES OF WORKSPACE: INTERIOR DESIGNERS IN THE U.K., FRANCE, GERMANY, SPAIN

	Interior Designers About Their Clients' Employees							
	U.K.		France		Germany		Spain	
Base	91		80		81		84	
	Very Important	Very True for Most	Very Important	Very True For Most	Very Important	Very True For Most	Very Important	Very True For Most
	%	%	%	%	%	%	%	%
Comfortable heating and air conditioning where you work	79	10	65	29	78	11	71	20
Proper lighting	75	18	81	35	93	12	71	18
A comfortable chair that can be adjusted to your needs	73	11	74	30	84	22	74	10
An office or work area close to people you work with on a regular basis	65	18	38	18	44	4	46	12
Enough worksurface space to display or spread out work	58	7	38	13	68	7	55	6
Adequate storage and file space	56	20	59	20	64	11	65	1
Adequate meeting space in or near your office or workspace	45	11	36	10	51	10	21	2
Enough privacy and quiet	33	9	38	14	57	2	36	2

OW-Q.14

Table 5-15

COMMON FACILITIES OFFERED AT ORGANIZATIONS: EEC OFFICE WORKERS

	Office Workers				
	EEC Total	U.K.	France	Germany	Spain
	1449	250	248	251	250
	%	%	%	%	%
Organization's Facilities Include:					
Areas specifically set aside for training	59	63	69	63	41
Rooms or other areas set aside for ongoing work on specific projects	50	39	54	60	52
Areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally	42	40	35	54	29
Areas set aside for child care	6	5	7	3	4

OW-Q.14

Table 5-16

COMMON FACILITIES OFFERED AT ORGANIZATIONS: EEC OFFICE WORKERS BY SIZE OF ORGANIZATION

		Size of Organization			
	EEC Total	100 or Less	101-500	501-5000	Over 5000
	1449	165	222	378	390
	%	%	%	%	%
Organization's Facilities Include:					
Areas specifically set aside for training	59	26	47	71	71
Rooms or other areas set aside for ongoing work on specific projects	50	39	44	51	56
Areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally	42	37	40	45	42
Areas set aside for child care	6	3	2	6	9

FM-Q.10

Table 5-17

COMMON FACILITIES OFFERED AT ORGANIZATIONS: EEC FACILITIES MANAGERS

	Facilities Managers				
	EEC Total	U.K.	France	Germany	Spain
	507	102	100	100	101
	%	%	%	%	%
Organization's Facilities Include:					
Areas specifically set aside for training	78	83	78	90	77
Rooms or other areas set aside for ongoing work on specific projects	62	54	61	71	70
Areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally	47	58	31	50	45
Areas set aside for child care	9	11	9	11	4

6: HOW THE PROFESSIONAL OFFICE ENVIRONMENT COMMUNITY RESPONDS

Issues Impacting Design

Top executives, facilities managers and interior designers were asked to assess the impact of nine concerns on office design over the next five years or so.

Across the EEC, top executives believe that telecommunications and computer needs will be most influential on office design, as 71% of top executives in the EEC overall and 83% of executives in Spain, 81% in Germany, 78% in the U.K. and 63% in France say this will have "a great deal" of impact (Table 6-1). Top executives also acknowledge the importance of attracting and retaining skilled employees, space costs and health and safety legislation and regulation, though these are expected to have less of an impact on facilities design than telecommunications and computer needs.

Facilities managers concur with top executives on the impact of telecommunications and computer needs -- 80% of facilities managers, including clear majorities in the U.K. (87%), Spain (83%), France (80%) and Germany (75%) say they expect this to have a great deal of impact (Table 6-2). Health and safety legislation and regulation are also viewed as influential (55% in the EEC, including 75% in the U.K., 56% in Germany, 54% in Spain and 43% in France), and facilities managers acknowledge the importance of needing to attract and retain skilled employees and space costs. Facilities managers in Spain do not anticipate that office workers involvement in design or an increasingly participative workplace will impact facilities design, and costs of any kind (furniture, space or the need to use existing furniture rather than buying new) will have the least impact in Germany, and the most in the U.K.

Interior designers show similar expectations, reporting that telecommunications and computer needs will have the most impact (96% in Spain, 95% in Germany, 91% in France, and 90% in the U.K.), followed by attracting and retaining skilled employees, space costs and health and safety legislation and regulation (Table 6-3). Utilizing existing furniture rather than purchasing new is only expected to have an impact on design in the U.K. (with minimal impact in France, Germany and Spain), and privacy will have minimal impact in the U.K. and Spain. Interior designers also say that the participative workplace or office worker involvement in office design will not affect design in Spain.

The Facilities Management Function

A substantial 60% majority of top executives in the EEC overall -- including 75% in Germany, and 61% in the U.K. -- report their organizations have a full-time facilities management function; however, the corresponding figure is less than a majority in France (50%) and Spain (43%).

Overall, by 61-21%, top executives see facilities management more as asset management than as an expense. Spanish, French, and U.K. top executives are more likely to see it as asset management than as an expense (by 83-3%, 64-11%, and 59-21%, respectively); German top executives tend to see it more of an expense (45%) than as asset management (40%). Only in the U.K. do a majority of executives think that facilities management should be linked to business plans "a great deal" (55%); fewer than one in three in Germany (30%) and an even lower 17% in Spain and 15% in France concur. As to whether facilities management actually is linked to the business plan, only 34% in the U.K., 33% in Germany and 10% in France and Spain say this is so.

The Use of Outside Design Professionals

Overall in the EEC, 39% of top executives report their organization routinely engages outside design professionals. The U.K. leads in the use of outside design professionals, as 47% of top executives say they routinely engage outside design professionals, compared to 37% in Spain and 33% in France and Germany (Table 6-5). Of those who say they routinely engage outside designers, Spanish top executives are most satisfied (26% say they are "very satisfied," and a total of 84% are at least "somewhat satisfied"); 18% of executives in France and Germany are "very satisfied" (83% in France are at least "somewhat satisfied", dropping to a lower 74% in Germany), and 12% in the U.K. are "very satisfied" (81% are satisfied).

According to facilities managers, who may have more "direct" experience than top executives with outside designers, Spain leads the way in the use of outside design professionals (60%) followed by the U.K. (41%), France (34%) and Germany (33%) (Table 6-6). According to facilities managers who say they hire designers, designers exert the most influence in France (32% of those who engage them say they have "a great deal" of influence over the organization's furniture and equipment standards), and the least in Germany (9% say they have "a great deal" of influence). Facilities managers in the U.K. and France are most satisfied, (29% of those who engage them say they are "very satisfied"), compared to Germany and Spain (18%), and fully 94% in France, 91% in Germany, 89% in the U.K. and 88% in Spain say they are at least "somewhat satisfied." Designers are used principally for design functions (60% of those who engage them), but also for ongoing facilities management (40%), installation or project management (29%), and consultation (14%).

Observation:

The facilities management function is more mature in the U.K. and Germany than in France or Spain. But organizations in Spain appear just as likely as those elsewhere in the EEC to engage outside designers on a regular basis. It should be noted that country-by-country differences in these findings could to some degree, be an effect of differences in the way respondents understood the concepts.

Telecommunications and computer needs will have far and away the greatest influence in the future design of office space, as reported by top executives, facilities managers and interior designers alike.

CEO-Q.16a

Table 6-1

ANTICIPATED IMPACT ON FACILITIES DESIGN: EEC TOP EXECUTIVES

"A Great Deal of Impact"

	Top Executives				
	EEC Total 518 %	U.K. 102 %	France 103 %	Germany 103 %	Spain 103 %
Telecommunications and computer needs	71	78	63	81	83
The need to attract and retain skilled employees	45	37	33	57	63
Space costs	43	56	33	35	53
Health and safety legislation and regulation	40	41	28	39	53
An increasingly participative work environment	32	20	42	36	22
Costs for office furniture and equipment	22	23	25	15	15
Office worker involvement in the design of the work environment	20	7	30	32	4
Worker desire for privacy	18	5	40	16	12
The need to utilize existing furniture rather than purchase new furniture	14	24	14	15	5

FM-Q.14a

Table 6-2

ANTICIPATED IMPACT ON FACILITIES DESIGN: EEC FACILITIES MANAGERS

"A Great Deal of Impact"

	Facilities Managers				
	EEC Total	U.K.	France	Germany	Spain
	507	102	100	100	101
	%	%	%	%	%
Telecommunications and computer needs	80	87	80	75	83
Health and safety legislation and regulation	55	75	43	56	54
The need to attract and retain skilled employees	47	62	35	64	51
Space costs	45	69	51	30	47
An increasingly participative work environment	32	32	37	31	20
Worker desire for privacy	25	11	37	25	10
The need to utilize existing furniture rather than purchase new furniture	24	44	26	22	14
Costs for office furniture and equipment	24	40	33	16	17
Office worker involvement in the design of the work environment	21	23	27	19	6

ID-Q.12a

Table 6-3

ANTICIPATED IMPACT ON FACILITIES DESIGN: INTERIOR DESIGNERS IN THE U.K., FRANCE, GERMANY, SPAIN

"A Great Deal of Impact"

	Interior Designers			
	U.K.	France	Germany	Spain
Base	91	80	81	84
	%	%	%	%
Telecommunications and computer needs	90	91	95	96
The need to attract and retain skilled employees	79	41	68	54
Space costs	76	63	43	64
Health and safety legislation and regulation	56	39	42	42
Costs for office furniture and equipment	55	46	28	19
An increasingly participative work environment	51	39	30	6
The need to utilize existing furniture rather than purchase new furniture	37	4	9	2
Office worker involvement in the design of the work environment	25	24	26	1
Worker desire for privacy	18	56	40	15

CEO-Q.12, 13, 14a, 14b

Table 6-4

FACILITIES MANAGEMENT: EEC TOP EXECUTIVES

	Top Executives				
	EEC Total 518 %	U.K. 102 %	France 103 %	Germany 103 %	Spain 103 %
Have full-time facilities management	60	61	50	75	43
Have part-time facilities management	36	34	39	24	56
View Facilities Design and Management:					
More as expense	21	21	11	45	3
More as asset management	61	59	64	40	83
Facilities Plans should be Linked to Business Plan:					
A great deal	37	55	15	30	17
Somewhat	38	34	33	33	54
Not very much	13	5	18	20	25
Not at all	7	1	21	11	4
Facilities Plans are Linked to Business Plan :					
A great deal	26	34	10	33	10
Somewhat	35	38	33	29	43
Not very much	23	18	17	20	39
Not at all	10	6	27	11	8

CEO-Q.15a,15b

Table 6-5

USE OF OUTSIDE DESIGN PROFESSIONALS:
EEC TOP EXECUTIVES

	Top Executives				
	~~EEC~~ Total	U.K.	France	Germany	Spain
Base	518	102	103	103	103
	%	%	%	%	%
Routinely engages outside design professionals	39	47	33	33	37
Does not engage	59	49	65	64	61
(Base: Engages outside design professionals)	(199)	(48)	(48)	(34)	(38)
Satisfaction with use of outside design professionals					
Very satisfied	19	12	18	18	26
Somewhat satisfied	66	69	65	56	58
Somewhat dissatisfied	7	4	6	21	8
Very dissatisfied	1	-	3	-	3

FM-Q.13a, 13c, 13e

Table 6-6

USE OF OUTSIDE DESIGN PROFESSIONALS: EEC FACILITIES MANAGERS

	Facilities Managers				
	EEC Total	U.K.	France	Germany	Spain
	507	102	100	100	101
	%	%	%	%	%
Routinely engages outside design professionals	39	41	34	33	60
Does not engage	61	59	66	67	39
(Base: Engages outside design professionals)	(213)	(42)	(34)	(33)	(61)
Extent to which design professionals influence organization's furniture and equipment standards:					
Great deal	21	26	32	9	13
Somewhat	41	36	32	48	36
Not too much	26	31	21	30	31
Not at all	11	7	15	6	16
Satisfaction with use of outside design professionals:					
Very satisfied	21	29	29	18	18
Somewhat satisfied	69	60	65	73	70
Somewhat dissatisfied	5	5	-	3	7
Very dissatisfied	*	-	-	-	3

7: KEY FINDINGS FOR THE U.K.

The Global Perspective

Top executives in organizations for which the question is applicable in the U.K. are more likely than their counterparts in the EEC as a whole to say their organizations participate in the international marketplace in terms of facing competition from foreign companies, participating in joint ventures with companies in other countries, exporting products or services and having wholly-owned facilities in other countries. Office workers who are employed by organizations other than non-profit or government entities seem less than fully aware of the extent of their organization's international business concerns (See Tables 1-1 and 1-2).

How Office Workers Feel About Their Work

More than half (57%) of office workers in the U.K. feel the quality of working life has improved over the past ten years, about the same as the proportion of office workers in the EEC as a whole (60%) who say the same thing. Top executives and facilities managers in the U.K. (as elsewhere) tend to be more optimistic, with 77% and 76%, respectively believing the quality of working life has improved in the past decade; 80% of U.K. contract interior designers feel the same way (see Table 2-1).

Office workers in the U.K. are reasonably content with their jobs; 36% of office workers in the U.K., compared with a lower 28% across the entire EEC, are "very satisfied" with their jobs. As is found for the EEC on average, U.K. top executives (6%), facilities managers (11%), and interior designers (4%) underestimate the extent to which office workers are "very satisfied" (see Table 2-3).

Office workers in the U.K. are just as likely as their counterparts across Europe to feel "a great deal" of connection between doing their jobs well and getting what they want out of life (both 65%). Top executives in the U.K. tend to underestimate this linkage, with only 35% thinking their office workers would feel "a great deal" of connection between the two. EEC top executives overall also underestimate the linkage, but far less dramatically (53%) (see Table 2-5).

Office workers in the U.K. experience substantial "aspiration gaps" when it comes to characteristics of the workplace -- there is a gaping difference between the level of importance they attach to most of these characteristics and the reality they are confronted with. Office workers perceive the widest gaps on the honesty of management (-60 percentage points), management recognition of employee contributions (-53 points), clear goals and direction from management (-51 points), and receiving the necessary tools and resources from management (-48 points). They express the narrowest gaps on employee benefits (-11 points) and encouragement of risk-taking (-3 points). These gaps are generally similar to those found throughout the EEC; averaged across all sixteen attributes, U.K. office workers express a gap of -31, compared to -29 in the EEC as a whole -- with markedly wider gaps on management providing tools and resources and job security. Like their counterparts in the EEC overall, U.K. top executives underestimate the gaps shown for office workers on at least half of the characteristics (see Table 2-9). (It is noteworthy that job security is not one of them.)

A startling 80% of U.K. top executives say their organization has undergone a reorganization in the past year or two, compared to only 54% in the EEC as a whole. More executives in the U.K. than in the EEC on average report that their organization has eliminated a large number of white collar jobs (44%

vs. 29%), and U.K. top executives are far more likely to expect to do so in the next twelve months (41%, compared to 22% in the EEC overall). Office workers in the U.K. are also more likely than their counterparts in the EEC on average to report the elimination of white collar jobs in the past year or two (28% vs. 20%) and to anticipate further white collar layoffs in the next twelve months (27% vs. 16%) (see Tables 2-11 and 2-12).

How Office Workers Work

A somewhat greater portion of U.K. office workers (55%) than EEC office workers overall (45%) prefer to work independently, identifying problems or goals and figuring out how to get them solved or achieved; U.K. workers are also considerably more likely to work in this fashion (50%) than are those in the EEC overall (36%). Thirty percent currently are given a goal to achieve or a problem to solve (29% prefer to work this way), and under one in ten (9%) are told what to do and how to do it (5% prefer this manner of working) (see Table 3-1). In addition, like office workers across the EEC, U.K. office workers report they spend most of their time working alone (56% of the work week) and less time working on formal teams (26% of their time) or informally with others (18% of their time) (see Table 3-3).

U.K. office workers are more likely than EEC office workers overall to report implementation of three of the five total quality management initiatives tested (see Table 3-4). According to office workers, the notion of continuous improvement in the work is more often fostered in the U.K. (79%) than in the EEC on average (65%) and is the most frequently adopted of the TQM measures. Almost two-thirds (65%) of U.K. office workers, compared to 56% in the EEC overall, say their organization measures customer satisfaction, and over half (56%) say their company has a "do-it-right-the-first-time" philosophy, compared to only 40% in the EEC as a whole. Measuring office worker productivity is reported by 45% in the U.K. (compared to a similar 41% on average), and 30% in the U.K. (compared to a similar 32% on average) say their organization offers its office workers incentive compensation linked to the quality of their work. Like their counterparts across the EEC, U.K. office workers strongly support the notion of continuous improvement (93% favor), measuring customer satisfaction (91% favor) and incentive compensation linked to quality (82% favor), while productivity measurement (69% favor) and a "do-it-right-the-first-time" philosophy (68%) also receive majority support (see Table 3-4).

A majority of office workers in the U.K. feel "pushed to the wall" on productivity; 58% say they "certainly do as much as they can," a full 10 percentage points higher than the corresponding figure for the EEC as a whole (48%). Fifteen percent (compared to 25% across the EEC) say they "probably" do as much as they can, while 26% (the same as the EEC average) say they "could probably do more." Top executives underestimate the extent to which office workers feel "pushed to the wall"; only 18% think office workers certainly do as much as they can. Yet unlike their counterparts across the EEC, U.K. top executives are not more likely than office workers themselves to think their office workers could do more (28%). Facilities managers also underestimate how "pushed to the wall" office workers feel (30%), but again are no more likely than office workers themselves to feel office workers could do more (25%). Only a handful of interior designers in the U.K. (5%) believe office workers are certainly doing as much as they can; the majority think office workers could do more (62%) (see Table 3-7).

Office workers in the U.K. work a median of 38 hours in an average work week (compared to 40 hours for the EEC overall); most (74%) think this is "just right," and only 23% (compared with a higher 31% across the EEC think this is "too much" (see Table 3-8). They spend a median of two hours per week in meetings; 20% say they think this is too much time (see Table 3-10).

Over four in five (84%) U.K. office workers report they use a computer terminal or personal computer -- a proportion close to that reported for the EEC on average (80%) but higher than that shown for Germany or Spain (both 77%). Nearly one-quarter (24%) use a PC or terminal five or more hours per day, with median usage of 3 hours per day (see Table 3-11). U.K. top executives (55%) are about as likely as those in the EEC as a whole (59%) to have a PC or terminal in their office (see Table 3-12).

The findings suggest an unfulfilled demand among U.K. office workers for employer-provided financial support or facilities for child care (35% view this as "very important," while 14% say their employer offers it). Office workers are just as likely to report their employer offers flexible hours and flexible benefits as they are to say each of these arrangements is "very important" to them, and they are more likely to say their employer offers the opportunity to do part-time work, to work at home, and to split a job with someone else than they are to deem each of those arrangements "very important" (see Table 3-13).

Environmental, Health and Safety Issues

As in the EEC overall, office workers (97%) favor recycling programs in the office workplace (97%), and top executives appreciate the level of office worker support (95% think most employees would favor such a policy). Over three in five (63%) of office workers and 71% of top executives say their organization currently recycles (see Table 4-1).

Again, as in the EEC overall, greater proportions of office workers in the U.K. favor instituting six specific health and safety policies in the workplace than say their organization currently offers these programs. An overwhelming 88% favor having a health program promoting good health habits, while only 51% say their organization currently offers such a program; 75% favor an alcohol or drug abuse treatment program, while only 16% say their employer offers one; and 71% favor providing employees with information about AIDS, while 35% do so now. At a much lower level of support, drug testing for new hires is favored by 42% of office workers, while only 5% say their organization does so; 37% favor drug testing for current employees, while only 2% say their organization does so; screening prospective employees for AIDS is favored by 30% of office workers, while only 5% say their organization currently performs such screening (see Table 4-2). Executives in the U.K. understand that majorities of office workers support programs promoting good health habits, alcohol or drug abuse programs, and programs for providing employees with information about AIDS in the workplace; top executives are more likely than office workers to say their organization currently offers them. Top executives are also aware that many fewer workers support drug testing and AIDS screening (see Table 4-5).

In findings which closely track those for the EEC overall, U.K. office workers express concern over eyestrain (46% say it is at least a "somewhat serious" problem in the workplace) and air quality (40%). Potential harmful radiation from VDTs is perceived as serious by 31% of office workers, followed by repetitive strain injury (18%) and exposure to hazardous material in the office building (15%) (See Table 4-6). U.K. top executives underestimate office workers concern over eyestrain (27% feel they would see this as at least "somewhat serious"), air quality (26%), and harmful radiation from VDTs (13%), as do facilities managers on air quality (29%) and VDT radiation (12%); both top executives (25%) and facilities managers (28%) seem to overestimate office workers' concern about repetitive strain injuries (see Tables 4-7, 4-8). Interior designers in the U.K. overestimate office worker concern on eyestrain (76%), air quality (73%), and repetitive strain injury (49%) (see Table 4-9).

How the Physical Environment Supports the Office Worker

Fewer office workers in the U.K. (36%) than in the EEC as a whole (51%) say they have a private office with a door, although U.K. office workers are no less likely than average for the twelve countries to report they are the "only occupant" of a private office (19% vs. 22%). U.K. office workers are more likely than average to share open space with others (49% vs. 31%). Only 14% of U.K. office workers (compared with an identical 17% on average) say they work in partitioned space (see Table 5-1). Facilities managers tend to confirm these findings, reporting that a mean of 33% of their office workers have private offices (compared with 53% for the EEC overall), 25% (compared with 20%) work in partitioned space, and 41% (compared with 26% in the EEC overall) in open space; facilities managers see little change in the layout of office space, save a small expected increase in the use of partitioned space, over the next five years (see Table 5-2). Interior designers, on the cutting edge of office design, also foresee a slight increase in the use of partitioned space over the next five years (see Table 5-3).

Though most U.K. office workers favor having a standards program in the office (63%), only 46% say their job entitles them to certain types of furniture or workspace and an even smaller 28% say this is part of a formal standards program (see Table 5-4). Just over half (53%) of U.K. facilities managers report their organization has a standards program, and 59% think their employees would favor such a program (see Table 5-6). Among interior designers in the U.K., 44% say that "practically all" of their clients have a standards program, and 64% think most of their clients' employees would favor one (see Table 5-7). Fewer office workers in the U.K. (43%) than in the EEC overall (53%) have any choice in the details of their workspace (see Table 5-8).

An examination of specific features of the workspace reveals substantial aspiration gaps -- some higher than the EEC average -- between what office workers say is important to their productivity and the extent to which they find these features to be true. Aspiration gaps are widest in the U.K. for comfortable heating and air conditioning (-46 vs. -35 on average), proper lighting (-43 vs. -31 on average), adequate file and storage space (-31 vs. -25 on average), enough privacy and quiet (-30 vs. -31 on average), and having a comfortable chair (-30 vs. -27 on average) (see Table 5-11). Facilities managers underestimate the gaps on all of these items except proximity of work colleagues (see Table 5-13). For the most part, interior designers tend to show larger gaps than either facilities managers or office workers (see Table 5-14).

Sixty-three percent of office workers in the U.K. (compared with 59% in the EEC overall) report their organization has specific areas set aside for training, 40% (compared with 42% overall) say there are areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally, and 39% (compared with a much higher 50% in the EEC overall) say their organization has rooms set aside for work on ongoing projects. Only 5% (compared with 6% overall) say there are areas set aside for child care in their company (see Table 5-15).

How the Professional Office Environment Community Responds

As in the EEC overall, telecommunications and computer needs head a list of factors which top executives, facilities managers, and interior designers in the U.K. expect to have "a great deal" of impact on facilities design in the next five years. Top executives and facilities managers next cite the need to attract skilled employees, space costs, and health and safety regulation -- although in different order -- while interior designers cite space costs, worker desire for privacy, and furniture and equipment costs (see Tables 6-1, 6-2, 6-3).

Much as in the EEC overall, over three in five (61%) top executives in the U.K. report their organization has a full-time facilities management function, and 34% say they have such a function on a part-time basis (see Table 6-4). U.K. executives tend to see facilities management more as asset management (59%) than as an expense (21%); a majority (55%, compared to only 37% in the EEC overall) think that facilities management should be linked to the business plan "a great deal," though only 34% (compared to 26% in the EEC overall) say this is indeed the case.

Nearly half (47%) of top executives say their organization engages outside design professionals, compared to a lower 39% in the EEC overall; 81% of those who use them are at least "somewhat satisfied" with the outside designers. A slightly smaller proportion of facilities managers in the U.K. (41% compared with 39% in the EEC overall) say their firm engages outside designers; of those who do, 26% say these designers have a great deal of influence on the organizations furniture and equipment standards, and 89% say they are at least "somewhat satisfied" with the use of outside designers.

8: KEY FINDINGS FOR FRANCE

The Global Perspective

Among those for whom the question is applicable, top executives in France are as likely as top executives throughout the EEC to say their organizations participate in the international marketplace in terms of facing competition from foreign companies, participating in joint ventures with companies in other countries, exporting products or services and having wholly-owned facilities in other countries. Office workers who are employed by organizations other than non-profit or government entities do not seem fully aware of the extent of their organization's international business concerns (see Tables 1-1, 1-2).

How Office Workers Feel About Their Work

Fewer than half (46%) of office workers in France feel the quality of working life has improved over the past ten years, much lower than the proportion of office workers in the EEC as a whole (60%) who say the same thing. French office workers are also more likely to say the quality of work life has deteriorated (27%) than office workers in the EEC as a whole (18%). Top executives and facilities managers tend to be more optimistic, with 85% and 75%, respectively, believing the quality of working life has improved in the past decade; interior designers (66%) tend to agree with office workers (see Table 2-1).

Compared to EEC office workers overall, those in France are less likely to report they are "very satisfied" (16% vs. 28%). Nonetheless, job satisfaction among office workers in France is actually higher (16% are "very satisfied") than top executives (2%), facilities managers (4%) or interior designers (5%) think (see Table 2-3). Office workers in France are just as likely as their counterparts across the EEC to feel "a great deal" of connection between doing their jobs well and getting what they want out of life (60% in France vs. 65% in the EEC overall). Top executives in France show a better-than-average understanding of this linkage, with 55% thinking their office workers feel a great deal of connection between the two (see Table 2-5).

Office workers in France experience substantial "aspiration gaps" on specific characteristics of the workplace, but on several factors these are narrower than the gaps expressed by office workers in the EEC overall. French office workers perceive the widest gaps on the honesty of management (-43 points, compared with -54 on average), employee participation in problem-solving (-36, vs. -37 on average), management protection of the environment (-32, vs. -38 on average), clear goals and direction from management (-31, vs. -45 on average), and good pay (-30, vs. -27 on average). They express the narrowest gaps on employee benefits (-2, vs. -14 on average) and employee contributions to the company (-12, vs. -18 on average). Averaged across all sixteen attributes, French office workers express a gap of -24, compared to -29 for the EEC as a whole. For the most part, French office workers are not less likely to find such characteristics to be true than their EEC counterparts; rather, office workers in France perceive these characteristics to be of lower importance. Even so, top executives in France fail to recognize these gaps, underestimating them for many characteristics (see Table 2-9).

French top executives report fewer restructurings than their counterparts in the EEC overall. Only 28% of French top executives say their organization has undergone a management reorganization in the past year or two, compared to 54% in the EEC as a whole. In France, 25% report they have eliminated white collar jobs, about the same proportion as seen for the EEC on average (29%). But French top executives are less likely to anticipate layoffs in the next twelve months (9%) than are top executives in the EEC as a whole (22%) (see Table 2-11).

How Office Workers Work

French office workers prefer to work independently, identifying problems or goals and figuring out how to get them solved or achieved (55%), but they are less likely to report they actually work in this fashion (41%). (By way of comparison, 45% of office workers in the EEC as a whole would prefer to work independently; 36% actually do.) Workers just as often are given a goal to achieve or a problem to solve (43%), though a lower 33% say they would prefer to work this way. Under one in ten (6%) are told what to do and how to do it; only 3% prefer this manner of working (see Table 3-1). Like their counterparts throughout the EEC, French office workers spend most of their time working alone (55% of the work week), and less of their time on formal teams (23% of their work week) and working informally with others (22%) (see Table 3-3).

According to office workers, TQM measures are implemented quite extensively in the French office workplace. The findings indicate that measuring customer satisfaction is more pervasive in France (70%) than in the EEC overall (56%), as is measuring office worker productivity (51% vs. 41%) and having a "do-it-right-the-first-time" philosophy (48% vs. 40%). Nearly two-thirds (64%, the same as the EEC average of 65%) say their organization fosters the notion of continuous improvement in the workplace, and 39% (similar to 32% in the EEC overall) say their organization offers its office workers incentive compensation linked to the quality of their work. Like office workers across the EEC, French office workers most strongly favor the notion of continuous improvement (87%), measuring customer satisfaction (86%), and incentive compensation linked to quality (76%). The same proportion of French workers as of EEC office workers overall (59%) favor a "do-it-right-the-first-time" philosophy, and French office workers are less likely than average (48% vs. 60%) to favor productivity measurements (see Table 3-4).

French office workers appear to be somewhat less likely than those in the EEC overall to feel "pushed to the wall" on productivity; 43% say they "certainly do as much as they can;" the corresponding figure for the EEC as a whole is 48% (see Table 3-7). Top executives underestimate the extent to which office workers feel "pushed to the wall," with only 16% thinking office workers certainly do as much as they can. Facilities managers and interior designers also underestimate the degree to which office workers feel "pushed to the wall" (16% and 4%, respectively).

Office workers in France work a median of 39 hours in an average work week; most (62%) think this is "just right," while 31% think this is "too much" (see Table 3-8). They spend a median of two hours per week in meetings; 12% say they think this is too much time (see Table 3-10).

Over four in five office workers in France (82%) say they use a computer terminal or personal computer -- the same as the EEC average of 80%. One-fifth (20%) use a PC or terminal five or more hours per day (see Table 3-11). Sixty percent of French top executives say they have a PC or terminal in their office -- right on the EEC average of 59% (see Table 3-12).

Regarding flexible work arrangements, office workers face unfulfilled demands only on receiving financial support or facilities for child care (35% feel this is "very important"; 14% "very true"); office workers are as likely to report flexible benefits and flexible hours are offered by their organization as they are to say they are "very important"; they are more likely to report the ability to work at home, job sharing, and working part-time are offered by their employer than they are to say these benefits are "very important" to them (see Table 3-13).

Environmental, Health and Safety Issues

Office workers in France favor initiating a recycling program in the workplace (92%), and top executives understand that most office workers feel this way (89%), yet only 22% of office workers and 35% of top executives say their organization currently recycles (see Table 4-1).

Fewer office workers in France than in the EEC overall favor instituting specific health programs in the workplace. A program promoting good health habits receives the most support (67% favor compared with 84% in the EEC overall), followed by an alcohol or drug abuse treatment program (62% vs. 74% across the EEC) and providing employees with information about AIDS (57% vs. 67% across the EEC). Much smaller proportions of French office workers favor pre-employment drug testing (19% vs. 40% across the EEC), drug testing for current employees (19% vs. 37% across the EEC), and AIDS screening for prospective employees (14% vs. 33% across the EEC). As in the EEC overall, the proportion of office workers who say their organization offers each of these programs is smaller than the proportion favoring it. Only 26% say their organization has a program to promote good health habits, 21% on alcohol or drug abuse treatment program, 20% on AIDS information program. And virtually no French office workers report their organization currently screens prospective employees for AIDS (2%) or requires drug testing for either new hires or current employees (both 1%) (see Table 4-2). Top executives seem to be aware that their employees favor proactive health, substance abuse treatment, and AIDS information programs, but show little support for drug or AIDS testing (see Table 4-5).

Asked about potential workplace hazards, French office workers express the most concern about eyestrain (63% say it is a serious problem in the workplace), followed by air quality (43%), potential harmful radiation from VDTs (33%), exposure to hazardous material in the office building (17%), and repetitive strain injury (13%). Eyestrain is deemed more serious in France than in the EEC as a whole (63% vs. 51%) (see Table 4-6). French top executives strongly underestimate office workers' concern about each of these potential hazards (see Table 4-7), while facilities managers concerns more closely match those of office workers (see Table 4-8). Interior designers in France place greater emphasis on all potential health hazards tested except the risk of repetitive strain injury (see Table 4-9).

How the Physical Environment Supports the Office Worker

In the type of usual workspace arrangements they report, French office workers do not differ from those across the entire EEC. Nearly half (48%) say they have a private office with a door, and one-quarter (25%) say they are the sole occupant of a private office; one-third share open space with others, while fewer than one in five (18%) have partitioned space (see Table 5-1). Facilities managers report that a mean of 61% have private offices, 21% work in partitioned space and 16% in open space, and expect little change in the layout of office space over the next five years (see Table 5-2). Interior designers, on the cutting edge of office design, foresee an increase in the use of partitioned space over the next five years (from a mean of 38% to 45%) (see Table 5-3).

Though a minority of French office workers favor having a formal standards program in the office (39% compared to a much higher 65% EEC average), 57% say their job entitles them to certain types of furniture or workspace, and 33% say their organization has a formal standards program. Just over half (58%)

of facilities managers report their organization has a standards program, and 53% think the employees of their company would favor such a program (see Table 5-6). Among interior designers, 44% say that "practically all" of their clients have a standards program, and 49% think most of their clients' office workers would favor one (see Table 5-7). More often than not, office workers in France report they have some choice (52%) in the details of their workspace (see Table 5-8).

While the findings reveal shortfalls between what French office workers deem important to their productivity and what they find true on a handful of specific features of the workspace, overall the "gaps" shown on these features are narrower in France than in the EEC as a whole, chiefly because French office workers find them less important. Aspiration gaps are widest in France for proper lighting (-25 points, vs. -31 for the EEC overall) comfortable heating and air conditioning (-24 vs. -35), and adequate file and storage space (-22 vs. -25). Narrower gaps are shown on privacy and quiet (-18 vs. -31), a comfortable chair (-14 vs. -27), sufficient worksurface space (-11 vs. -23), adequate meeting space (-3 vs. -9), and having an office close to other people you work with (-6 vs. -8) (see Table 5-11). Facilities managers approximate the gaps of office workers (see Table 5-13), and interior designers show larger gaps than either facilities managers or office workers (see Table 5-14).

Sixty-nine percent of office workers in France report their organization has specific areas set aside for training, 54% say their organization has rooms set aside for work on ongoing projects, and 35% say there are areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally. Only 7% say there are areas set aside for child care in their company (see Table 5-15).

How the Professional Office Environment Community Responds

Top executives in France (63%), like those across the EEC as a whole (71%), expect telecommunications and computer needs to have the greatest impact on facilities design in the next five years. An increasingly participative work environment (42%) and worker desire for privacy (40%) are expected to have more of an impact in France than the EEC as a whole (where 32% and 18%, respectively, expect them to have "a great deal" of impact). One-third (33%) say the need to attract and retain skilled employees and space costs will have a great deal of impact (lower than 45% and 43%, respectively, across the EEC) (see Table 6-1). Facilities managers also report that computer needs will have the greatest impact on facilities design (80%), followed by space costs (51%) and health and safety legislation and regulation (43%) (see Table 6-2). Interior designers express similar expectations, emphasizing worker desire for privacy (see Table 6-3).

One-half (50%) of top executives in France report their organization has a full-time facilities management function -- somewhat less than 60% for the EEC on average. Like their counterparts across the twelve countries, French executives tend to see facilities management more as asset management (64%) than as an expense (11%). But top executives in France are much less likely than those in the EEC on average to believe facilities plans should be linked to the business plan "a great deal" (15% vs. 37%) and to report facilities plans are linked to the business plan "a great deal" (10% vs. 26%) (see Table 6-4).

One-third (33%) of top executives in France say their organization routinely engages outside design professionals, similar to 39% in the EEC overall; of those who do, 83% are at least "somewhat satisfied" with the use of outside designers. A similar proportion of facilities managers in France (34%)

say their organization routinely engages outside design professionals; of those who do, 32% say these designers have a great deal of influence on the organization's furniture and equipment standards, and 94% say they are at least somewhat satisfied with the use of outside designers.

9: KEY FINDINGS FOR GERMANY

The Global Perspective

Top executives in Germany for whom the question is applicable are just as likely as their counterparts in the EEC as a whole to say their organizations participate in the international marketplace in terms of facing foreign competition, exporting products or services, and participating in joint ventures with companies in other countries; they are more likely than average to report wholly-owned facilities in other countries. German office workers who are employed by organizations other than non-profit or government entities seem less than fully aware of the extent of their organization's international business concerns (see Tables 1-1, 1-2).

How Office Workers Feel About Their Work

A 63% majority of office workers in Germany (similar to the 60% majority of office workers across the EEC) feel the quality of working life has improved over the past ten years. As in the EEC overall, top executives and facilities managers in Germany tend to be more optimistic, with 89% and 85%, respectively, believing the quality of working life has improved in the past decade. Interior designers tend to agree (88%).

Office workers in Germany are reasonably content with their jobs; 34% are "very satisfied" with their jobs, compared with 28% on average for the EEC. As found for the EEC on average, top executives (6%), facilities managers (5%), and interior designers (10%) underestimate the extent to which office workers are "very satisfied" (see Table 2-3). Office workers in Germany are just as likely as their counterparts across the EEC to feel "a great deal" of connection between doing their jobs well and getting what they want out of life (68%). But in Germany, unlike the EEC overall or any of the other three European countries for which the OEI provides a detailed reading, top executives seem to overstate this linkage; 76% think their office workers feel a great deal of connection between the two (see Table 2-5).

On specific workplace characteristics, the "aspiration gaps" reported by office workers in Germany -- the difference between the level of importance they attach to each characteristic and the reality they are confronted with -- are about on par with the EEC average for a range of key factors but are somewhat lower on other factors. Taken as a whole "aspiration gaps" in Germany are narrower than those found throughout the EEC; averaged across all sixteen attributes, German office workers express a gap of -25 percentage points, compared to -29 in the EEC as a whole. Office workers perceive the widest gaps on the honesty of management (-52 percentage points), clear goals and direction from management (-42 points), management recognition of employee contributions (-40 points), management support for the natural environment (-37 points), and encouragement of employees to participate in problem-solving (-36 points) -- all of which are about the same as the gaps seen for the EEC as a whole. German office workers are less frustrated than the average EEC office worker on pride in the quality of their organization's products and services (-14 vs. -25 points), advancement opportunities (-13 vs. -21 points), management providing appropriate tools and resources (-31 vs. -39 points), management sensitivity to employees' family responsibilities (-27 vs. -35 points), job challenge (-11 vs. -18 points), and job security (-8 vs. -15 points). Top management's appreciation of office worker frustration is fairly accurate on some characteristics and less so on others, but overall German executives show a better-than-average understanding of their office workers on these characteristics (see Table 2-9).

Only a little more than one-third (36%) of German top executives say their organization has undergone a management reorganization in the past year or two, compared to 54% in the EEC as a whole. Many fewer executives in Germany than in the EEC as a whole report that their organization has eliminated a large number of white-collar jobs (17% vs. 29%), and German top executives are far less likely than average to expect to do so in the next twelve months (9% vs. 22%) (see Table 2-11).

How Office Workers Work

Like EEC office workers overall, German office workers prefer to work independently, identifying problems or goals and figuring out how to get them solved or achieved (44%); 30% prefer to be given a goal to achieve or a problem to solve, and only 2% prefer to be told what to do and how to do it. (In Germany, a higher-than-average proportion of office workers -- 23% -- would prefer some combination of these modes.) The same proportion (32%) report they actually work independently, identifying and solving problems, as report they are given a problem but devise the solution, and 9% report they are told what to do and how to do it (see Table 3-1). In findings identical to the EEC average, German office workers report they spend a mean of 52% of their work week working alone, 25% of their time working informally with others, and 23% of their time working on a formal team (see Table 3-3).

From the findings it would appear that Germany lags behind other EEC countries on the implementation of TQM measures. Office workers in Germany are less likely than those across the EEC on average to report implementation of four out of the five TQM initiatives tested. While (58%) in Germany say their organization fosters the notion of continuous improvement, this compares to 65% in the EEC as a whole; 41% in Germany say their organization measures customer satisfaction, compared to 56% in the EEC as a whole; 30% in Germany say their organization measures office worker productivity, compared to 41% for the EEC overall; 19% say their company has a do-it-right-the-first-time philosophy, compared to a much higher 40% for the EEC as a whole. Only on incentive compensation for quality of work does the proportion of German office workers reporting implementation match that of EEC office workers on average (38% vs. 32%).

Office workers in Germany are as likely as their counterparts across the EEC to favor the notion of "continuous improvement" (89% vs. 91%), are are slightly more likely than average to favor incentive rewards for quality work (85% vs. 79%). But they are less likely than average to support customer satisfaction measurements (76% vs. 85%), worker productivity measurements (49% vs. 60%), and a "do-it-right-the-first-time" philosophy (39% vs. 59%) (see Table 3-4).

Like office workers, German top executives are also less likely than their counterparts across the EEC overall to report implementation of four out of the five TQM initiatives tested -- the exception, again, being incentive compensation for quality of work. German top executives are as likely as EEC top executives on average to favor "continuous improvement," compensation based on quality, and productivity measurement, but are less likely than average to favor customer satisfaction measurement and a "do-it-right-the-first-time" philosophy (see Table 3-5).

Over 2 in 5 (41%) of office workers in Germany -- fewer than the EEC average of 48% -- feel "pushed to the wall" on productivity, saying they "certainly do as much as they can." Twenty-six percent say they "probably" do as much as they can, while 32% (higher than the 26% recorded for the EEC on average) say they "could probably do more." Top executives in Germany underestimate the extent to which office workers feel "pushed to the wall"; only 13% think office workers certainly do as much as they can, while 50% think office workers could do more. Facilities managers (16%) and interior designers (6%) also underestimate how "pushed to the wall" office workers feel (see Table 3-7).

Just like office workers in the EEC on average, office workers in Germany work a median of 40 hours in a typical work week; most (58%) think this is "just right," but 38% (higher than the EEC average of 31%) think this is "too much" (see Table 3-8). They spend a median of 4 hours per week in meetings (compared with only 2 for the EEC overall); 13% say they think this is too much time (see Table 3-10).

Nearly four in five (77%) German office workers say they use a computer terminal or personal computer, compared with a similar 80% of EEC office workers overall who say the same thing. Fewer than one in five (16%) use a PC or terminal more than five hours per day, compared with a somewhat higher 21% in the EEC overall (see Table 3-11). Germany top executives (60%) are just as likely as those in the EEC as a whole (59%) to have a PC or terminal in their office (see Table 3-12).

As in the EEC overall, unfulfilled demand for innovative work arrangements is shown only for employer-provided financial support or facilities for child care. Office workers are more likely to report their employer offers flexible benefits, flexible hours, job sharing, and the ability to work part-time than they are to say these benefits are "very important" to them, while they are equally likely to report their employer offers the opportunity to work at home as they are to say that is very important (see Table 3-13).

Environmental, Health and Safety Issues

As in the EEC overall, virtually all German office workers (99%) favor initiating a recycling program in the workplace, and top executives are well aware of employees' views on the matter (96%). Nearly four in five (79%) of office workers and 85% of top executives say their organization currently recycles, making Germany the leader in this area (the corresponding figures for the EEC on average are 55% and 61%) (see Table 4-1).

As in the EEC overall, greater proportions of office workers in Germany favor instituting specific health programs in the workplace than say their organization currently offers these programs. Fully 89% favor having a health program promoting good health habits, and only 42% say their organization currently offers such a program; 77% favor an alcohol or drug abuse treatment program, and only 28% say their employer now offers one; and 61% favor providing employees with information about AIDS, while 18% do so now. At a much lower level of support, drug testing for new hires is favored by 34% of office workers, while 9% say their organization does so; 35% favor drug testing for current employees, while 7% say the organization now does so; screening prospective employees for AIDS is favored by 25% of office workers, and 4% say their organization currently performs such screening (see Table 4-2). Top executives in Germany recognize a high level of office worker support for programs promoting good health habits (89%), alcohol or drug abuse programs (83%), and AIDS information programs (52%); executives are far more likely than office workers to say their organization currently offers them. At the same time, top executives also understand that few employees would support drug testing or AIDS screening in the office workplace (see Table 4-5).

German office workers express lower-than-average concern about eyestrain (39% say it is a "very" or "somewhat" serious problem in the workplace, compared with 51% overall in the EEC), air quality (29% vs. 39%) and potential harmful radiation from VDTs (24% vs. 33%). Repetitive strain injury is deemed serious by 18% (compared with 17% on average) and exposure to hazardous material by 12% (compared with 17%) (see Table 4-6). German top executives underestimate office workers concern over eyestrain (24%) and air quality (a mere 8%); though 33% of facilities managers say eyestrain is a serious problem, only 10% say air quality is a serious problem (see Tables 4-7, 4-8). Interior designers in Germany place greater emphasis on all health hazards in the workplace -- 75% perceive eyestrain as a serious problem, followed by 55% who rate air quality as serious, 44% radiation from VDTs and exposure to hazardous material in the office building, and 39% repetitive strain injury (see Table 4-9).

How the Physical Environment Supports the Office Worker

Far more office workers in Germany (75%) than in the EEC as a whole (51%) say they have a private office with a door -- including 29%, higher than the EEC average of 22%, who report they are the only occupant of a private office. Only 9% (compared to 17% on average) say they work in partitioned space, and only 15% (compared with 31% on average) share open space with others (see Table 5-1). Facilities managers tend to confirm the findings from office workers, reporting that a mean of 70% have private offices, 18% work in partitioned space and 11% in open space. Facilities managers see little changes in the layout of office space over the next five years (see Table 5-2). Interior designers, on the cutting edge of office design, also foresee little change (see Table 5-3).

German office workers are far likelier than average to favor having a formal standards program in the office (80% vs. 65%), but fewer (62% vs. 54% on average) say their job entitles them to certain types of furniture or workspace, and fewer still (32%) say their organization has a formal standards program (see Table 5-4). Similarly, German facilities managers are more apt than those in the EEC overall to report their organization has a standards program (85%) (see Table 5-6); 46% of German interior designers say that "practically all" of their clients have a standards program (see Table 5-7). Office workers in Germany (77%) are much more likely than those in the EEC on average (53%) to report they have some choice in the details of their workspace (see Table 5-8).

An examination of specific features of the workspace reveals substantial aspiration gaps between what office workers say is important and to what extent they find these features to be true. Aspiration gaps are widest in Germany for privacy and quiet (-36), comfortable heating and air conditioning (-33), proper lighting (-28) and having a comfortable chair (-25). German office workers show a lower-than-average gap on storage space (-13 vs. -25) (see Table 5-11). Facilities managers in Germany have a fairly good grasp of the shortcomings of the personal workspace, as office workers see them (see Table 5-13), and interior designers show larger gaps than either facilities managers or office workers on all tested features (see Table 5-14).

Sixty-three percent of office workers in Germany report their organization has specific areas set aside for training (similar to the EEC average of 59%), 60% (higher than the EEC average of 50%) say their organization has rooms set aside for work on ongoing projects, and 54% (higher than 42% on average) say there are areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally. Only 3% say there are areas set aside for child care (see Table 5-15). Larger proportions of facilities managers report that their organization offers training areas, ongoing work or project areas, and child care facilities (see Table 5-17).

How the Professional Office Environment Community Responds

Top executives in Germany concur with their counterparts in the EEC that telecommunications and computer needs will have the greatest impact on facilities design in the next five years (81% in Germany, compared with 71% on average, predict this will have "a great deal" of impact). The need to attract and retain skilled employees is cited more often in Germany (57%) than in the EEC as a whole (45%), as is office worker involvement in the design of the work environment (32% vs. 20%). Health and safety legislation and regulation is expected to have "a great deal" of impact by 39% of top executives in the U.K., while a lower 35% say the same for space costs (see Table 6-1).

Facilities managers also report that computer needs will have the greatest impact on facilities design (75%), followed by the need to attract and retain skilled employees (64%, much higher than the average of 47%) and health and safety legislation and regulation (56%) (see Table 6-2). Interior designers have similar expectations (see Table 6-3).

Three-quarters (75%) of top executives in Germany report their organization has a full-time facilities management function -- higher than the 60% average across the EEC. But German top executives are much more likely than average to view facilities management as an expense (45%, compared with 21%). Much like their counterparts across the EEC, 30% of German top executives think that facilities management should be linked to the business plan "a great deal," and 33% say this is indeed the case (see Table 6-4).

One-third of top executives say their organization engages outside design professionals, compared to 39% in the EEC overall; of those who do, 74% are at least "somewhat satisfied" with the outside designers they use (see Table 6-5). A similar 33% of facilities managers say their firm engages outside designers, again compared to 39% in the EEC overall; of those who engage them, only 9% (compared with 21% on average) say these designers have a great deal of influence on furniture and equipment standards, and 91% say they are at least "somewhat satisfied" with the use of outside designers.

10: KEY FINDINGS FOR SPAIN

The Global Perspective

Top executives in Spain for whom the question is applicable are less likely than their counterparts in the EEC as a whole to say their organizations participate in the international marketplace in terms of facing competition from foreign companies, participating in joint ventures with companies in other countries, exporting products or services and having wholly-owned facilities in other countries. Office workers who are employed by organizations other than non-profit or government entities are also less likely than their counterparts across the EEC to report their organizations participate in such activities (Tables 1-1, 1-2).

How Office Workers Feel About Their Work

A majority (67%) of office workers in Spain feel the quality of working life has improved over the past ten years, slightly more than the proportion of office workers in the EEC as a whole (60%) who say the same thing. Top executives and facilities managers in Spain tend to be even more optimistic, with 92% and 87%, respectively, believing the quality of working life has improved in the past decade. Interior designers tend to agree (92%) (see Table 2-1).

Compared with EEC office workers on average, those in Spain show a low level of job satisfaction (only 18% in Spain say they are "very satisfied," compared to 28% in the EEC overall). Nonetheless, satisfaction among office workers is higher than top executives (5%), facilities managers (1%) or interior designers (2%) would expect (see Table 2-3). Office workers in Spain (53%) are also less likely than their counterparts across the EEC (65%) to feel a great deal of connection between doing their jobs well and getting what they want out of life. Top executives also tend to underestimate this linkage, with only 31% guessing their office workers would feel a great deal of connection between the two (see Table 2-5).

Office workers in Spain report the widest "aspiration gaps" on specific characteristics of their job and workplace -- there are gaping differences between the levels of importance they attach to these characteristics and the realities they are confronted with. Office workers perceive the widest gaps on the honesty of management (-67 points vs. -54 on average), management recognition of employee contributions (-61 points vs. -41 on average), encouragement of teamwork (-55 points vs. -25 on average), encouragement of employee problem-solving (-52 points vs. -37 on average) and management recognition of the need to protect the environment (-50 points vs. -38 on average). Even their narrowest gaps -- on job security (-21) and employee risk-taking (-30) -- are substantial. Averaged across all sixteen attributes, Spanish office workers express a gap of -44 points, compared to -29 for EEC office workers as a whole. In general, Spanish office workers attach a greater importance to the specific characteristics than EEC office workers do overall. And they find many of the specifics to be less true of their job than the average EEC office worker does, as well. Top executives show little appreciation of office workers' frustration, underestimating the gap on thirteen of the sixteen characteristics (see Table 2-9).

Fully 65% of Spanish top executives (compared to 54% on average) say their organization has undergone a management reorganization in the past year or two. The proportion of top executives who report they have eliminated a large number of white collar jobs is about the same as the EEC average (27% vs. 29%). As in the EEC overall, few Spanish top executives report that their organization has merged with another company (15% vs. 12%), although Spanish top executives are more likely than average to say their organizations have been acquired (14% vs. 7%) (see Table 2-11).

How Office Workers Work

Spain is the only one of the four EEC countries measured individually in which office workers do not express a preference for working autonomously; Spanish office workers are as likely to prefer being given a goal to achieve or a problem to solve and then figuring out how to do it (42%) as to prefer working independently, identifying problems or goals and getting them solved or achieved (37%). Nonetheless, fewer than one in ten (3%) prefer to be told what to do and how to do it. Office workers most often work in their preferred mode of being given problems to solve and creating the solutions themselves (38%), followed by working independently (29%) and being told what to do (14%) (see Table 3-1). Like EEC office workers on average, Spanish workers spend most of their time working alone (a mean of 53% of their work week), and less of their time working on formal teams (28% of their work week) or informally with others (19% of their work week) (see Table 3-3).

Spanish office workers are more likely than office workers across the EEC to report their organization has implemented two key elements of total quality management: customer satisfaction measurements (72% vs. 56%) and a "do-it-right-the-first-time" philosophy (53% vs. 40%). Reported implementation of fostering the notion of continuous improvement (64%) and measuring office worker productivity (45%) is close to the EEC average, while Spanish office workers are less likely than average to report that their organization offers incentive compensation based on quality of work (22% vs. 32%). Each of the five TQM measures tested is favored by a majority of Spanish office workers -- larger than average for customer satisfaction measurement, office worker productivity measurement, and the "do-it-right-the-first-time" philosophy (see Table 3-4). The findings for top executives in Spain follow a similar pattern (see Table 3-5).

Office workers in Spain are less likely than office workers in the EEC overall to feel "pushed to the wall" on productivity; 36% say they "certainly do as much as they can, compared with 48% on average. As many as 32%, compared with 26% on average, say they "could probably do more." Top executives (17%), facilities managers (7%), and interior designers (4%) all underestimate the extent to which office workers feel "pushed to the wall" on productivity (see Table 3-7).

Like EEC office workers on average, office workers in Spain work a median of 40 hours in an average work week; most (62%) think this is "just right," while 37% think this is "too much" (see Table 3-8). They spend a median of 3 hours per week in meetings (compared with 2 on average); 7% say they think this is too much time (compared with 14% on average who think 2 hours are excessive!) (see Table 3-10).

Fully 77% of office workers in Spain say they use a computer terminal or personal computer. Nearly one-quarter (23%) use a PC or terminal five hours or more per day. (Both of these figures are close to the EEC average.) (See Table 3-11.) But Spanish top executives (68%) are more likely than those in the EEC as a whole (59%) to report they have a PC or terminal in their office (see Table 3-12).

Unlike the EEC overall, in Spain, office worker demand is unfulfilled on four of the six innovative arrangements tested. Spanish office workers are more likely to say flexible benefits, flexible hours, the opportunity to work part-time, and financial support or facilities for child care are "very important" than they are to report their employer offers them. In large part, this is due to Spanish office workers' higher-than-average expectations; they are much more likely than EEC office workers overall to see flexible benefits, part-time work, and child care support as important (see Table 3-13).

Environmental, Health and Safety Issues

Office workers in Spain overwhelmingly favor a recycling program in the workplace (92%), and top executives are well aware of office workers' views; however, only 23% of office workers and 28% of top executives say their organization currently recycles (see Table 4-1).

As in the EEC overall, far greater proportions of office workers in Spain favor instituting specific health programs in the workplace than say their organization currently offers these programs. An overwhelming 96% favor having a program promoting good health habits, while only 41% say their organization currently offers such a program; 89% favor an alcohol or drug abuse treatment program, while only 11% say their employer offers such a program; 74% favor providing employees with information about AIDS, while 10% do so now; screening prospective employees for AIDS is favored by fully 65% of office workers, while 11% say their organization currently performs such screening; 48% favor drug testing for new hires, while only 3% say their organization does so; and 47% favor drug testing for current employees, while 2% do so now (see Table 4-2). Top executives in Spain recognize that office employees would support a health program promoting good habits (97%), an alcohol or drug abuse program (79%), and a program providing employees with information about AIDS (52%). They understand that only minorities of office workers would favor drug testing for either new hires (43%) or current employees (29%), but fail to recognize that a solid majority of office workers would support AIDS screening (43%) (see Table 4-5).

Spanish office workers express concerns over eyestrain (61% say it is a "very" or "somewhat serious" problem in the workplace, compared with 51% in the EEC overall), potential radiation from video display terminals (45%, compared with 33% in the EEC overall) and air quality (42%, compared with 39% in the EEC overall). Repetitive strain injury is considered serious by 22%, and exposure to hazardous material in the office building by 19% (see Table 4-6). Spanish top executives and facilities managers both underestimate office workers' concern about each of these potential hazards (see Tables 4-7, 4-8); interior designers in Spain have a much better sense of the concern office workers have about these potential hazards (see Table 4-9).

How the Physical Environment Supports the Office Worker

Fewer office workers in Spain (38%) than in the EEC as a whole (51%) say they have a private office with a door, although Spanish office workers are just as likely (21%) as those in the EEC overall (22%) to report they are the sole occupant of a private office. However, office workers in Spain are more likely than their counterparts across the EEC to report working in partitioned space (26%, vs. 17% on average) and equally likely to work in open space arrangements (35% vs. 31%) (see Table 5-1). Facilities managers report that a mean of 31% of their office employees (vs. 53% EEC-wide) have private offices, 22% (vs. 20% EEC-wide) work in partitioned space, and 47% (vs. 26% EEC-wide) in open space. Facilities managers see some change in the layout of office space over the next five years, with increases in the use of partitioned space (see Table 5-2). Interior designers also foresee a slight increase in the use of partitioned space over the next five years (from a mean of 40% now to 45%) (see Table 5-3).

Most Spanish office workers favor having a formal standards program in the office (61%), and 59% say their job entitles them to certain types of furniture or workspace. Equal proportions (27% each) say this is the result of a formal program and say it just works out that way (see Table 5-4). A majority (69%) of facilities managers report their organization has a standards program, and 45% think their office employees would favor such a program (see Table 5-6). Among interior designers, 38% say that "practically all" of their clients have a standards program, and 30% think most of their clients' office employees would favor one (see Table 5-7). Nearly three in five (58%) Spanish office workers report they have some choice in their workspace details (see Table 5-8).

An examination of specific features of the workspace reveals substantial aspiration gaps between what office workers say is important and the extent to which they find these features to be true. Aspiration gaps are widest in Spain for enough privacy and quiet (-43 points, compared with -31 points in the EEC overall), adequate storage and file space (-40 points, compared with -25 on average), a comfortable chair (-35 points, compared with -27 on average), proper lighting (-32 points, compared with -31 on average) and enough worksurface space (-31 points, compared with -23 on average). The gaps for comfortable heat and air conditioning (-27 points), adequate meeting space (-17 points), and having an office close to other people you work with (-13 points) are narrower (see Table 5-11). Facilities managers underestimate the gaps on all of these items (see Table 5-13), but interior designers consistently overstate the gaps (see Table 5-14).

Over half of Spanish office workers (52%) say their organization has rooms set aside for ongoing projects, 41% report their organization has specific areas set aside for training, 29% say there are areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally, and only 4% say there are areas set aside for child care in their organization (see Table 5-15). Larger proportions of facilities managers report that their organization has training areas (77%), areas where employees can meet or talk informally (45%), and rooms set aside for ongoing work (70%) (see Table 5-17).

How the Professional Office Environment Community Responds

Top executives in Spain concur with their counterparts across the EEC that telecommunications and computer needs will have the greatest impact on facilities design in the next five years, with Spanish executives more likely than average to say this will have "a great deal" of impact (83% vs. 71%). Retaining and attracting skilled employees (63% vs. 45% on average), space costs (53% vs. 43% on average) and health and safety legislation and regulation (53% vs. 40% on average) are more often seen as having "a great deal" of impact in Spain than in the EEC overall (see Table 6-1).

Facilities managers also expect that computer needs will have the greatest impact on facilities design (83%), followed by health and safety legislation and regulation (54%), the need to attract and retain skilled employees (51%) and space costs (47%) (see Table 6-2). Interior designers express similar expectations (see Table 6-3).

Only 43% of top executives in Spain, compared with a much higher 60% for the EEC on average, report their organization has a full-time facilities management function. Nonetheless, Spanish top executives tend to see facilities management more as asset management (83%) than as an expense (3%). But only 17% -- much lower than the 37% average -- think facilities plans should be linked to the business plan "a great deal," and only 10% -- lower than the 26% seen on average -- say this is indeed the case.

Over one-third (37%) of top executives say their organization engages outside design professionals, comparable to 39% in the EEC as a whole. Of those who engage them, 84% are at least "somewhat satisfied" with their use of outside designers (see Table 6-5). A larger proportion of facilities managers in Spain (60%) than in the EEC as a whole (39%) say their firm engages outside designers; of that group, 13% say these designers have a great deal of influence on the organization's furniture and equipment standards, and 88% say they are at least "somewhat satisfied" with the use of outside designers.

APPENDIX A: METHODOLOGY

EEC Samples

-- Office Workers. Interviews were conducted with a total of 1,449 office workers screened from national samples of adults 18 years and over in the twelve countries of the EEC. To be eligible for the study, an office worker must have worked full-time in an office with 25 or more office workers employed at their branch or location and have worked in any office setting for at least six months. In screening office workers by these criteria, eligible adults in each contacted household were enumerated; in the event that more than one adult in the household was an eligible office worker, the one with the most recent birthday became the designated respondent. The national samples from which eligible office workers were screened were drawn through both random-digit-dialing and directory methods.

Quotas for number of completed office worker interviews were set for each of the twelve EEC countries: 250 each were slated for the U.K., France, Germany (the western part) and Spain (for statistically readable bases in those important Steelcase markets), accounting for 1,000 out of the total quota of 1,500; quotas were set to divide up the remaining 500 interviews among the other eight EEC countries proportionate to the distribution of white collar workers in those eight countries as per Organization for Economic Cooperation and Development (OECD) Labor Force Indicators. When tabulating the results, a total for the EEC was created by weighting the interviews in the twelve countries to be proportionate to the distribution of white collar workers across all twelve countries. (In addition, statistical weights were applied to account for households with multiple eligibles.)

All interviews were conducted by telephone in the evening and on weekends. Interviews with office workers took an average of 25 minutes each to complete.

-- Top Executives and Facilities Managers. The samples of top executives (518) and facilities managers (507) were drawn from the same universe: the top tier by number of employees of organizations in each of the twelve EEC countries including publicly and privately held corporations, nonprofit organizations, and government entities. The top tier was defined to be the top 300 such organizations in each of the U.K., France, Germany, and Spain, and the top 300 organizations in the other eight EEC countries on a combined basis. The top executive was defined as the chief executive officer of the organization or his/her designee at the strategic planning level, preferably the human resources executive. The facilities manager was defined as the executive responsible for facilities management in the organization -- management of the organization's facilities including planning, design, and construction -- or a ranking designee performing those functions. Qualifying facilities managers must have had such responsibilities in any company or organization -- not necessarily with their current employer -- for a minimum of three years.

The universe was identified on the basis of Dun & Bradstreet listings for the twelve countries into which were interfiled governmental entities not included in the D & B file. For each sample group (top executives and facilities managers), country quotas were set at 100 interviews per country in the U.K., France, Germany, and Spain (for statistically readable bases in those countries), with another 100 interviews divided among the remaining eight countries proportionate to the distribution of white collar workers in those eight countries as per OECD statistics. Systematic random selection techniques were employed when drawing the samples to ensure that all organizations listed in each country had an equal probability of being selected. When tabulating the results, a total for the EEC was created by weighting the interviews in the twelve countries to be proportionate to the distribution of white collar workers across all twelve countries, as reported by the OECD.

Interviews were conducted by telephone with executives in their offices during regular office hours on weekdays. Average interview length: 20 minutes.

-- Interior Designers. Interviews with interior designers were conducted only in countries with readable samples of office workers, top executives, and facilities managers (the U.K., France, Germany, and Spain). The samples of interior designers in these countries were drawn from lists of design firms provided by Steelcase Strafor.

As in other countries, only one designer could be interviewed per office, but various offices of the same firm in different geographic locations could be added to the list and treated as separate organizations.

An interior designer needed to qualify as "one of the senior people in your firm responsible for contract interior design including programming, planning, and specifying architectural finishes and office furnishings," and to have been doing "that kind of work" for at least five years in any firm.

Interviews were completed with 91 designers in the U.K., 80 in France, 81 in Germany, and 84 in Spain. Interviews were conducted by telephone with designers in their offices during business hours, and took an average of 20 minutes each to complete.

Sampling Error

The results achieved from any sample survey are subject to sampling error. Sampling error is defined as the difference between the results obtained from the sample and those that would have been obtained had the entire population been surveyed. The size of sampling error varies both with the size of the sample and with the percentage giving a particular answer. The following table sets forth the range of error in samples of different sizes at different percentages of response:

APPROXIMATE SAMPLING TOLERANCES (AT 95% CONFIDENCE) TO USE IN EVALUATING PERCENTAGE RESULTS APPEARING IN THIS REPORT

Number of People Asked Question on Which Survey Result Is Based	Survey Percentage Result at 10% or 90%	Survey Percentage Result at 20% or 80%	Survey Percentage Result at 30% or 70%	Survey Percentage Result at 40% or 60%	Survey Percentage Result at 50%
1,000	2	2	3	3	3
900	2	3	3	3	3
800	2	3	3	3	3
700	2	3	3	4	4
600	2	3	4	4	4
500	3	4	4	4	4
400	3	4	4	5	5
300	3	5	5	6	6
200	4	6	6	7	7
100	6	8	9	10	10
50	8	11	13	14	14

For example, if the response for a sample size of 1,000 is 30%, in 95 cases out of 100 the response in the total population would be between 27% and 33%.

Note that survey results based on subgroups of small size can be subject to large sampling error.

The recommended allowances for sampling error were calculated based on single random sample.

Significance of Difference Between Proportions

The difference between the percentage responses given by two independent samples to the same question may or may not be significant. To determine whether or not such a difference is indeed significant, the size of the samples involved and the percentage giving each response must be taken into account. The following table shows the margin of error that must be allowed for different sample sizes at different percentages of response:

APPROXIMATE SAMPLING TOLERANCES (AT 95% CONFIDENCE) TO USE IN EVALUATING DIFFERENCES BETWEEN TWO PERCENTAGE RESULTS APPEARING IN THIS REPORT

Approximate Sample Size of Two Groups Asked Question on Which Survey Result Is Based		Survey Percentage Result at 10% or 90%	Survey Percentage Result at 20% or 80%	Survey Percentage Result at 30% or 70%	Survey Percentage Result at 40% or 60%	Survey Percentage Result at 50%
1,000 vs.	1,000	3	4	4	4	4
	800	3	4	4	5	5
	500	3	4	5	5	5
	300	4	5	6	6	6
	200	5	6	7	7	8
	100	6	8	9	10	10
	50	9	11	13	14	14
800 vs.	800	3	4	4	5	5
	500	3	4	5	5	6
	300	4	5	6	7	7
	200	5	6	7	8	8
	100	6	8	10	10	10
	50	9	11	13	14	14
500 vs.	500	4	4	6	6	6
	300	4	6	7	7	7
	200	6	7	8	8	8
	100	7	9	10	11	11
	50	9	12	13	14	15
300 vs.	300	5	6	7	8	8
	200	5	7	8	9	9
	100	7	9	10	11	11
	50	9	12	14	15	15
200 vs.	200	6	8	9	10	10
	100	7	10	11	12	12
	50	9	12	14	15	15
100 vs.	100	8	11	13	14	14
	50	10	14	16	17	17
50 vs.	50	12	16	18	19	20

For example, suppose one group of size 1,000 has a response of 34% "yes" for a question, and an independent group of size 100 has a response of 23% "yes" for the same question, for a difference of 11 percentage points. According to the table, this difference is subject to a potential sampling error of plus or minus 9 percentage points. Since the observed difference is greater than the potential sampling error, the observed difference is significant. Moreover, if the entire population were interviewed, the difference would be from 1 to 20 percentage points (the 11-point observed difference plus or minus the 9-point potential sampling error) in 95 cases out of 100.

Sampling error is only one way in which survey findings may vary from the findings that would result from interviewing every adult member of the population. Survey research is susceptible to human and mechanical errors as well, such as interviewer recording and data handling errors. However, the procedures used by the Harris firm keep errors of this kind to a minimum.

Table A-1

PROFILE OF EEC OFFICE WORKERS

	Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250
	%	%	%	%	%
Country					
U.K.	23	100	-	-	-
France	16	-	100	-	-
Germany	22	-	-	100	-
Spain	6	-	-	-	100
Sex					
Male	55	55	44	54	54
Female	45	45	56	46	46
Age					
18 to 20 years	3	5	*	3	1
21 to 24 years	9	13	8	8	12
25 to 29 years	13	12	15	11	15
30 to 34 years	16	13	12	15	19
35 to 39 years	15	20	16	15	17
40 to 49 years	26	25	31	23	23
50 to 64 years	15	11	13	20	11
65 and over	*	*	-	-	-
Median age	36	36	38	37	35
Size of Organization					
100 or fewer employees	11	9	12	13	13
101 to 500 employees	15	15	12	16	14
501 to 5,000 employees	27	30	18	24	30
Over 50,000	28	34	32	25	20
Type of Organization					
Manufacturing	27	29	24	35	25
Services	45	44	35	51	50
Government	25	25	38	8	26
Nonprofit	2	1	2	5	*

(Continued)

Table A-1 (Continued)

PROFILE OF EEC OFFICE WORKERS

	Total	U.K.	France	Germany	Spain
Base	1449	250	248	251	250
	%	%	%	%	%
Years in Workforce					
10 or more years	70	70	73	70	60
5 to 9 years	14	17	10	12	19
2 to 4 years	13	10	13	14	16
1 year or less	3	2	1	3	6
Median years in workforce	15	15	17	17	14
Years at Present Employer					
10 or more years	47	39	51	47	49
5 to 9 years	19	23	17	15	17
2 to 4 years	22	20	21	25	23
1 year or less	8	12	7	8	9
Median years with present employer	9	7	10	9	10
Years at Present Job					
10 or more years	21	12	24	28	17
5 to 9 years	18	16	19	11	21
2 to 4 years	33	30	31	31	41
1 year or less	16	21	18	20	17
Median years with present job	4	3	4	4	3
Marital Status					
Married	66	64	71	59	59
Divorced/Widowed/Separated	6	9	7	6	6
Single/never married	26	27	22	32	35
Self-Description of Position					
Managerial	31	37	33	27	32
Technical	22	26	24	12	30
Secretarial/clerical	44	32	42	56	35
Union members	31	36	15	23	16
Children in household	31	31	34	23	36

Table A-2

PROFILE OF EEC TOP EXECUTIVES

	Total	U.K.	France	Germany	Spain
Base	518	102	103	103	103
	%	%	%	%	%
Age					
18 to 24 years	*	-	-	-	2
25 to 29 years	2	2	4	1	5
30 to 34 years	6	4	9	9	9
35 to 39 years	8	12	10	8	20
40 to 49 years	44	40	50	41	41
50 to 64 years	37	41	26	39	23
65 and over	1	-	-	1	1
Median age	47	48	44	48	42
Median years in Workforce	25	26	20	25	23
Median years at present organization	16	13	10	18	11
Median years at present position	4	3	3	5	3
Number of Employees Employed by Organization Nationwide					
Less than 2,000	15	10	13	8	50
2,000 to 2,999	8	4	22	2	21
3,000 to 4,999	13	7	22	8	13
5,000 to 6,999	14	11	10	12	7
7,000 to 9,999	9	5	6	23	2
10,000 or more	39	64	26	47	7
Median	6,501	15,250	3,675	8,625	1,953

Table A-3

PROFILE OF EEC FACILITIES MANAGERS

	Total	U.K.	France	Germany	Spain
Base	507	102	100	100	101
	%	%	%	%	%
Age					
18 to 24 years	*	1	-	-	-
25 to 29 years	2	3	1	4	2
30 to 34 years	6	12	5	5	9
35 to 39 years	13	9	14	13	12
40 to 49 years	45	42	55	38	47
50 to 64 years	32	30	21	39	30
65 and over	1	2	-	-	1
Median age	46	45	45	47	45
Median years in workforce	25	24	24	25	24
Median years at present organization	17	18	18	18	18
Median years at present position	6	5	5	6	7
Number of Employees Employed by Organization Nationwide					
Less than 2,000	13	6	15	12	42
2,000 to 2,999	7	2	21	1	19
3,000 to 4,999	14	8	17	9	19
5,000 to 6,999	11	3	6	14	10
7,000 to 9,999	11	6	9	12	3
10,000 or more	39	65	24	50	2
Median average gross square feet per workstation	117	102	109	132	95

Table A-4

PROFILE OF EEC INTERIOR DESIGNERS

	U.K.	France	Germany	Spain
Base	91	80	81	84
	%	%	%	%
Sex				
Male	76	85	78	90
Female	24	15	22	10
Age				
18 to 24 years	-	-	-	-
25 to 29 years	14	4	2	-
30 to 34 years	31	13	14	27
40 to 49 years	26	45	36	40
50 to 64 years	10	25	30	17
65 and over	1	3	1	-
Median age	36	43	44	41
Median employees in company	40	5	6	8

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THE OFFICE ENVIRONMENT INDEX 1991: REPORT OF FINDINGS FOR JAPAN

A Study Conducted For
Steelcase, Inc.

Fieldwork: January-April 1991

Project Directors:

Merl W. Baker, President, Louis Harris and Associates (U.S.A.)
Erich Kramer, Senior Vice President
Sarah Dutton, Research Associate

LOUIS HARRIS AND ASSOCIATES, INC.
630 Fifth Avenue
New York, New York 10111
(212) 698-9600

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ABOUT THIS STUDY

Since 1978, Steelcase has sponsored survey research exploring the office workplace -- the Office Environment Index. This sixth edition of the OEI continues to track the views of office workers as well as those of executives and office interior designers on a wide range of workplace issues regarding both how work is done and the physical office environment. This year, the OEI was a worldwide undertaking, encompassing not only North America but also the twelve countries of the European Economic Community and Japan. This report presents the findings for Japan.

These findings are based on interviews with:

- 1,000 full-time office workers in Japan at organizations with at least 25 office employees at the branch locations where they work.
- 100 top executives drawn from the top 500 organizations in Japan ranked by number of employees
- 100 facilities managers drawn from the same universe of organizations as top executives
- 100 contract interior designers, selected from a list of firms supplied by Steelcase.

Interviews were conducted by telephone from January through April 1991. Interviews with office workers averaged 25 minutes in length, and those with executives, facilities managers and designers averaged 20 minutes. (To keep to these lengths in Japanese, the questionnaires are 5 minutes shorter than those in English.)

The study was designed and conducted by Louis Harris and Associates in conjunction with Steelcase Inc., the Institute of Business Designers, and the International Facility Management Association.

Details on the study method and profiles of the samples are provided in Appendix A.

HIGHLIGHTS FROM THE JAPAN FINDINGS

- Despite Improvement in the Quality of Working Life, Japanese Office Workers Express Relatively Low Levels of Job Satisfaction

  -- Though a 76% majority are at least somewhat satisfied, Japanese office worker job satisfaction is lower than that expressed in Canada, the United States and the EEC, even though a majority (60%) acknowledge improvement in the quality of working life in the past decade. Only 17% say they are "very satisfied" in the job they have now, and almost one-quarter (24%) admit to some degree of dissatisfaction.

  -- Less than one-third of office workers (31%) say that they feel there is "a great deal" of linkage between their job performance and getting what they want out of life (though 82% claim there is at least "some" connection between the two).

  -- Office workers were asked the degree of importance they attach to various attributes of the workplace and the degree to which they find these attributes to be true for the job they have now. In yet another indication of worker frustration, office workers report a significant "aspiration gap" (the difference the percentage who say an attribute is between "very important" and the percentage who say it is "very true") on every attribute. Workers express the severest levels of unfulfillment on the following issues: good pay (a gap of -56 percentage points), honesty and ethics of management (-56), employee recognition for contributions (-53), management sensitivity to family needs (-53), the clarity of direction and goals provided by management (-52) and encouragement of teamwork (-50).

- Top Executives Appear Largely Unaware of Office Worker Frustration

  -- Top executives do not appreciate the degree to which office workers are frustrated in their jobs, underestimating the "aspiration gaps" office workers experience on a range of specific job and workplace characteristics. Though Japanese top executives often agree with office workers on the prevalence of these characteristics in the workplace, they tend to miss the mark on the importance of the characteristics. Sensitivity to family needs, employee benefits, job security, providing employees with the necessary tools and resources, employee participation in problem-solving, protecting the environment, and employee contributions are far more important to workers than their bosses acknowledge. A number of these issues relate to the quality of life experienced by workers as an employee of their organization (benefits, security, family needs, the environment) -- issues that have less to do with job description and more to do with life outside the organization.

-- Executives also overestimate the connection office workers make between doing their job well and personal goals -- 44% of top executives think office workers would see "a great deal" of connection, while only 31% of office workers in fact say so.

- o Japanese Office Workers Prefer a More Participative Work Environment

-- Office worker aspiration gaps on those characteristics in the workplace which fall under the heading of a participative work environment illustrate Japanese office worker lack of fulfillment in this area, as follows; management recognition of employee contributions (-53 points) and encouragement of such contributions (-45), encouragement of teamwork (-50), job challenge (-48), and encouragement of problem-solving by employees (-43). Office workers in Japan show a preference for more independence and autonomy in the workplace than they report they now have -- almost half (49%) of all workers say they would prefer to "identify problems or goals and get them solved or achieved," though only 34% say they currently do so.

-- Workers place a fairly high degree of importance (often unfulfilled) on working in teams (73%). A mean of 28% of working time is spent on formal teams; employees spend a mean of 50% of their time working alone and the remaining 22% is spent working informally with others.

- o There Is Moderate Support for TQM Initiatives, But a Long Way To Go Toward Implementation

-- Total quality management, or TQM, is perhaps the larger context for the notion of the participative workplace. TQM earns moderate support from office workers and top executives in Japan (albeit the two groups do not agree on which initiatives are desirable), but the Japanese office environment exhibits relatively low levels of implementation for most TQM measures compared to the United States, Canada and the EEC.

-- Fully 85% of office workers and 95% of their bosses favor the "notion of continuous improvement in the work and the way things are done in the office," and almost three-quarters (73%) of office workers and four in five (82%) top executives favor measuring customer satisfaction.

Two-thirds of office workers (66%) and 43% of top executives favor linking worker incentive compensation to the quality of work, followed by having a "do-it-right-the-first-time" philosophy (54% of office workers, and 32% of top executives) and measuring office worker productivity (only 49% of office workers favor this idea but 79% of top executives support it).

-- Almost two-thirds of office workers (63%) and nearly three-quarters (72%) of top executives say that their company currently fosters the "notion of continuous improvement of the work and the way things are done in the office." Almost half of office workers (48%) and one-third (34%) of top executives say their company currently measures customer satisfaction. Incentive compensation based on the quality of work is reported by 39% of office workers and only 13% of top executives, followed by having a "do-it-right-the-first-time" philosophy (33% of office workers, and 17% of top executives), and measuring office worker productivity (33% of office workers and 26% of top executives).

o A Substantial Proportion of Japanese Workers Think They Could Do More in Their Jobs, Though They Work 45 Hours Per Week

-- Relatively few office workers (23%) believe they "certainly" do as much as they can in their current jobs; more say they "probably do as much as they can (44%) and one-third (32%) say they "could probably do more." Top executives (17%), facilities managers (12%), and interior designers (13%) are all less likely to feel office workers are doing as much as they can.

-- Office workers report that they work a median of 45 hours per week, with one-third (33%) feeling that the time they spend working is "too much."

o Distributed Computer Processing Low in Japan; Highest Among Younger Employees

-- Perhaps as the result of difficulties keyboarding Japanese characters, the use of computers in Japan is low (64%) when compared to the United States, Canada and the EEC. However, in a finding that suggests computer usage may be on the rise, younger workers report they are more likely to use such technology than their older co-workers (69% of 18 to 29 year-olds, 75% of 30 to 39 year-olds, 59% of 40 to 49 year-olds and only 45% of those age 50 and over).

- Open Space Arrangements

  -- The vast majority of office workers (87%) report that they occupy open space, rather than private offices (5%) or partitioned office space (7%). However, facilities managers and interior designers predict an increase over the next five years in the proportion of office workers with partitioned arrangements. As such layouts become more common, Japanese office workers can expect to benefit from the increased privacy and quiet afforded by partitioned designs.

- Standards Programs

  -- 60% of office workers report that their job entitles them to certain types of furniture, workspace and accessories, with 39% saying this is a formal policy. (A higher 78% favor a formal standards program.) A majority (64%) of facilities managers report their organization has a standards program. Facilities managers and interior designers both tend to understand that office workers favor such a program.

- Japanese Workers Also Experience Frustration With Specific Features of Their Personal Workspace

  -- When asked about specific features of their personal workspace, yet again, office workers experience a substantial shortfall between what they say is "very important" to their productivity and what they report to be "very true" for them today. The two characteristics leaving the most to be desired directly reflect a shortage of available space: "adequate file and storage space" shows a gap of -49 points, and "having enough worksurface space" shows a gap of -45 points. However, having a comfortable chair (-42 points), comfortable heat and air conditioning (-40), privacy and quiet (-34), proper lighting (-32) and adequate meeting space (-23) also elicit sizable "aspiration gaps."

  -- Facilities managers estimate quite accurately the shortfalls office workers express on having a comfortable chair, proper lighting, comfortable heat and air conditioning, adequate storage space, and adequate meeting space; but they underestimate the degree of office worker frustration on privacy and quiet and sufficient worksurface space. Interior designers professionals overestimate office worker frustrations on chairs, worksurface space, storage space, and meeting space.

- Despite Space Restrictions, Common Facilities Are Offered By Many Organizations

  -- Regardless of the restrictions imposed on office design by the high costs of space, many organizations in Japan offer common areas for the use of their employees. Areas other than the cafeteria or conference rooms where employees can get together to meet and talk are reported to be offered by their organization by more than half of office workers (53%). Similarly, almost half (49%) say their company has "areas set aside for training," and 42% say their company has space set aside for work on ongoing projects. Child care facilities at the workplace, however, are virtually non-existent (3%). As would be expected, larger organizations are more apt to offer such common facilities than smaller companies. The findings for facilities managers generally reflect those of office workers.

o Hazards in the Workplace

-- When asked how serious a health risk each of five hazards is in the workplace, 62% of office workers say that "eyestrain" is a "very" or "somewhat" serious problem. Air quality is also considered serious by more than half of all office employees (53%). The risk of repetitive strain injury (35%), potential radiation from video display terminals (33%) and exposure to harmful material in the building (25%) are considered serious by less than half the office worker population.

o The Facilities Management Function

-- Fewer than half (47%) of top executives in Japan report they have a full-time facilities management function, while 46% report they have such a function on a part-time basis. By 57% to 20%, top executives see this more as an expense than as asset management. Forty-four percent of top executives believe that facilities plans should be linked to the business plan "a great deal", though only 16% say they are linked to that extent.

o The Design Professional Community

-- Fewer than half of Japanese top executives say their firm engages outside design professionals (44%); of those who do, most are "very" or "somewhat" satisfied (77%). Similarly, 43% of facilities managers say their company engages outside design professionals, and fully 90% are satisfied with the work such designers perform. Fully 60% of facilities managers in organizations that hire outside design professionals say designers have "not too much" or "no influence" on the organization's furniture and equipment standards. More than four out of five facilities managers in companies that use design professionals say they use designers for specific design functions such as architectural design, interior design, or programming and schematic design.

- Issues Expected to Impact Facilities Design in the Next Five Years

  -- Telecommunications and computer needs, more than any other single issue, are expected to have the greatest impact on design over the next five years, according to top executives, facilities managers and interior designers alike. Space costs also rank high on the list, with majorities of all three groups expecting this to have "a great deal of impact." Majorities of interior designers also believe the need to attract and retain skilled employees, health and safety legislation and regulation, and an increasingly participative work environment will have "a great deal of impact."

CHAPTER 1: HOW OFFICE WORKERS FEEL ABOUT THEIR WORK

International Activity: Characterizing the Workplace

In the past decade, Japan has assumed a leadership position in the global marketplace, venturing deeply into foreign markets in the United States and Europe. Top executives, a reliable source for such information, attest to the international posture of Japan's largest organizations. Two-thirds or more of top executives in organizations to which the question applies say their company is involved in each international activity tested (Table 1-1). Seventy-one percent say their organization "participates in joint ventures with companies in other countries," followed by 67% who say they "face competition from foreign companies," 66% whose companies "export goods or services," and 65% who say they have "wholly-owned facilities in other countries." Office workers in Japan are less aware than top executives of the international scope of their organizations' business, as less than two in five of those in for-profit, private sector companies claim any one form of international activity. Only 29% claim that their company participates in joint ventures, 38% say their company faces competition from abroad, 36% say their company exports goods or services and 27% report that their company has wholly-owned facilities overseas.

Signs of Improvement in the Quality of Working Life in Japan

Fully 60% of Japanese office workers perceive that the quality of working life in Japan has improved in the last ten years; only 7% report that it has gotten worse (Table 1-2). Japanese top executives, facilities managers and interior designers are even more optimistic about the quality of work life than office workers -- 83% of top executives, 79% of designers and 73% of facilities managers claim that it has improved in the past decade.

Not surprisingly, managerial workers are substantially more likely than non-managerial workers (71% and 58% respectively) to believe the quality of working life has improved (Table 1-3). Longer memories may explain the fact that older workers are more likely to perceive improvement than younger workers: 67% of those age 50 or over say life has improved, compared to only 61% of those age 18 to 29 and 57% of workers age 30 to 39 and 40 to 49.

Job Satisfaction

However, when it comes to actual job satisfaction, Japanese office workers are not as satisfied as might be implied from the aforementioned data. Though 76% say they are at least "somewhat satisfied," only 17% say that they are "very satisfied" with their job, and 24% report some level of dissatisfaction with their job (Table 1-4).

As Table 1-5 illustrates, office worker job satisfaction tends to increase with age and job level; younger workers and non-managerial level employees show the least satisfaction -- 13% of 18 to 29 year-olds say they are "very satisfied," rising to 21% of those age 50 or over, and 15% of non-managerial level employees report they are "very satisfied," compared to 27% of managers.

Japanese top executives, like their counterparts around the world, tend to underestimate the degree to which office workers are "very satisfied" (Table 1-4). Facilities managers are even less likely to say most office workers are "very satisfied." Interior designers come closest to understanding the satisfaction levels of office workers.

Linkage Between Doing Job Well and Personal Satisfaction

Of particular note among the findings in Japan is the low level of "linkage" Japanese office workers feel between doing their job well and getting what they want out of life -- less than one in three (31%) report that they feel a "great deal" of connection (Table 1-6). The youngest office workers feel the least linkage, with only one in four, or 25%, of those 18 to 29 saying they feel a great deal of connection, compared to 30% of those 30 to 39, 39% of those age 40 to 49 and 33% of those age 50 or over. Not surprisingly, managerial workers perceive the highest degree of linkage of any group (42%), but 20% of these workers also report that there is "hardly any connection at all."

Japanese executives tend to overestimate their workers sense of linkage; when answering about their employees, 44% of top executives expect that office workers would feel a "great deal" of connection between doing their job well and personal satisfaction (Table 1-7).

Aspirations and Realities

The 1991 Office Environment Index presented office workers with a specific set of characteristics they might look for in a job. Office workers were asked how important each of these characteristics is to them, and how true each is for the job they have now. In addition, top executives were presented with the same list and asked how important and how true they believe each to be for their office workers.

Table 1-8 arrays the list of characteristics in order of their importance to office workers. The top four characteristics are all considered "very important" by almost 4 in 5 office workers (79%): job security, having a challenging job, management providing clear goals and direction for the organization, and employee pride in the quality of products and services the organization provides. For more than 7 out of 10 office workers the following are "very important": management provides me with the tools and resources to get the job done (76%), management recognizes my contributions (74%), management sensitivity to balancing family and job responsibilities (74%), encouragement of teamwork (73%), the opportunity to significantly contribute to the company (72%), management is honest, ethical and upright (72%), and good pay (71%). Employee benefits such as insurance and vacation are rated "very important" by seven out of ten office workers (70%). Sixty-three percent say the same about management recognition of the need to support the natural environment, and just over three out of five (61%) say that encouragement of employee problem-solving at all levels is "very important." Risk-taking is an important job characteristic to over half of office workers (52%). Ample opportunities to move up to a better position in the company is the only characteristic rated "very important" by less than half of all office workers, with only 43%.

Despite the large numbers of office workers who say these items are very important to them, Japanese office workers are not apt to find these characteristics to be true in their present jobs. Job security is "very true" for only 50% of all office workers -- creating a gap between importance (79% "very important") and reality (50% "very true") of -29 percentage points. These "aspiration gaps" illuminate the differences between what office workers consider to be important and to what extent their needs and desires are fulfilled.

Table 1-9 arrays office worker "aspiration gaps." A cursory examination of the data reveals that Japanese office workers often find themselves substantially unfulfilled -- the "gaps" on over one-third of the characteristics tested are at least fifty percentage points. Both good pay and management is honest, ethical and upright in its dealings with employees and the community show gaps of -56 points, followed by management recognition of employee contributions (-53), management sensitivity to the need to balance family and job responsibilities (-53), management providing clear goals and direction (-52) and management encouragement of teamwork (-50). Of those "second tier" characteristics showing gaps that are less than 50 percentage points but still substantial, management recognition of the need to support the natural environment and job challenge both show gaps of -48, followed by employee benefits (-46), employee contributions (-45), pride in the quality of products and services (-44) and employee problem-solving at all levels (-43). Management providing the tools and resources to get the job done shows a gap of (-38) and employee risk-taking shows (-34). The smallest gaps are found on job security, (-29), and opportunity to move up (-24).

Table 1-9 also arrays these aspiration gaps by age and job level. Marked differences are observed between managerial and non-managerial level office workers; as would be expected, non-managerial level workers experience larger aspiration gaps on many characteristics than managerial level employees. The biggest differences occur among the following characteristics: management is honest, upright and ethical in its dealing with employees and the community at large, management provides me with the resources and tools to get my job done, employee participation in problem-solving and good pay.

The findings suggest that younger office workers experience higher levels of frustration than older ones do on recognition of employee contributions, management sensitivity to the need to balance family and job, and employee participation in problem-solving, while older employees experience greater frustration than do their younger colleagues on management being honest, upright and ethical, management recognition of the need to protect the environment (-53), ample opportunities to move up (-32), employee benefits and encouragement of risk-taking.

Table 1-10 presents office worker aspiration gaps by number of employees in the company. Employees in smaller organizations seem more frustrated than those in larger ones about job security, employee benefits and managerial goals and direction; office workers in larger organizations tend to show wider gaps than their counterparts in smaller organizations on the honesty of management, protection of the environment, and job challenge.

As the findings on Tables 1-8 and 1-11 indicate, top executives show strong evidence of misunderstanding what their office workers value and want. On every single characteristic (except ample opportunity to move up), executives do not anticipate the extent to which their employees consider these characteristics important. Bosses underestimate importance to their workers most egregiously on management sensitivity to family needs, employee benefits, job security, providing employees with the necessary tools and resources, employee participation in problem-solving, protection of the environment and both the opportunity to contribute to the company and recognition for their contributions. In their defense, Japanese bosses are more aware of the extent to which their employees find these items to be "very true" for them on their jobs, often underestimating the responses of office workers.

As a result of misunderstanding the degree of importance their employees place on various aspects of their job, Japanese top executives seriously underestimate the degree to which their employees are unfulfilled on their jobs, as shown in the marked differences in the aspiration gaps expressed by office workers and the gaps executives think exist among their office workers. On 14 of 16 characteristics, bosses miss the mark. Most grossly underestimated are the worker aspiration gaps on:

-- Management sensitivity to the need to balance job and family responsibilities (an aspiration gap of -53 for office workers and only -14 for top executives answering for their office workers);

-- Management recognition of the need to protect the natural environment (-48 for office workers, -12 for top executives);

-- Job security (-29 for office workers, +3 for top executives); and

-- Management encouragement of problem-solving by employees at all levels (-43 for office workers, -11 for top executives).

Also seriously misunderstood by executives are management providing employees with the tools and resources necessary, management is honest, upright and ethical and good employee benefits.

Observation:

Notwithstanding the optimism of Japanese office workers regarding the improvement of working life over the past decade, the low level of job satisfaction (and the high level of dissatisfaction) points to some real problems for the Japanese office work force. This lack of satisfaction is underscored by the low sense of connection these workers feel between their personal life goals and their job performance, and unfulfilled aspirations on a broad range of office and job characteristics. The views of top executives are most accurately reflected in the older age groups, suggesting that Japanese work ethics and values are experiencing pressure from the younger members of the work force. The younger generation of Japanese office workers seem to be placing less emphasis on work in their life goals, and at the same time seem to be more demanding than their older counterparts as to what they want and expect from a job. It comes as no surprise that those workers on the bottom of the ladder, the non-managerial staff, are least fulfilled in their work. What is surprising is the level of discontent reported by all Japanese office workers, across all age groups and among all sizes of organizations -- the highest level of discontent in the world. Are workers' expectations too high, or do Japanese organizations need to re-think their managerial strategies? Quality of life issues, such as family needs, the environment, job security and benefits have begun to enter the Japanese office workplace in full force.

So far, Japanese bosses have yet to acknowledge the extent of these unfulfilled aspirations.

It should be noted that there are proportionately fewer self-defined managers in Japan than in the United States, Canada or the EEC, but it is unclear whether this reflects a real difference in Japan's office organizational structures or simply a greater reticence on the part of Japanese office workers to describe their status in this way. However we interpret the finding, the comparatively low satisfaction and high frustration levels seen among Japan's office workers overall seem related to the relatively low proportion in Japan who perceive themselves as managers.

Table 1-1

OW-Q.F8b
CEO-Q.F2

INTERNATIONAL ACTIVITY: JAPAN OFFICE WORKERS AND TOP EXECUTIVES

	Top Executives (Base: Those for whom question is applicable)	Office Workers (Base: All except those employed in not-for-profit or government organizations
Base	94 (average)	842
	%	%
Organization:		
Participates in joint ventures with companies in other countries	71	29
Faces competition from foreign companies	67	38
Exports products or services	66	36
Has wholly-owned facilities in other countries	65	27

Table 1-2

OW-Q.1a; CEO-Q.1a;
FM-Q.1a; ID-Q.1a

QUALITY OF WORKING LIFE COMPARED TO TEN YEARS AGO: JAPAN OFFICE WORKERS AND EXECUTIVES

	Office Workers	Top Executives	Facilities Managers	Interior Designers
Base	1000	100	100	100
	%	%	%	%
Improved	60	83	73	79
Gotten worse	7	3	3	1
Stayed the same	28	14	21	17
Not sure	5	-	3	3

Table 1-3

OW-Q.1a

QUALITY OF WORKING LIFE COMPARED TO TEN YEARS AGO: JAPAN OFFICE WORKERS BY AGE AND JOB LEVEL

	Total Office Workers	Age				Job Level	
		18-29	30-39	40-49	50 +	Managerial	Non-Managerial
Base	1000	252	289	276	164	151	849
	%	%	%	%	%	%	%
Improved	60	61	57	57	67	71	58
Grown worse	7	2	6	9	11	8	7
Stayed the same	28	23	35	31	21	19	29
Not sure	5	14	1	3	1	2	6

Table 1-4

OW-Q.3a; CEO-Q.3a;
FM-Q.3a; ID-Q.3a

OFFICE WORKER JOB SATISFACTION: JAPAN OFFICE WORKERS AND EXECUTIVES

	Office Workers	Top Executives Answering About their Employees	Facilities Managers Answering About the Employees of their Organization	Interior Designers Answering About Office Workers
Base	1000	100	100	100
	%	%	%	%
Very satisfied	17	9	4	13
Somewhat satisfied	59	73	74	61
Somewhat dissatisfied	21	18	14	13
Very dissatisfied	3	-	2	1
Not sure	*	-	6	12

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*Less than 0.5%.

Table 1-5

OW-Q.3a

JOB SATISFACTION: JAPAN OFFICE WORKERS BY AGE AND JOB LEVEL

		Age				Job Level	
	Total	18-29	30-39	40-49	50 +	Managerial	Non-Managerial
Base	1000	252	289	276	164	151	849
	%	%	%	%	%	%	%
Very satisfied	17	13	15	19	21	27	15
Somewhat satisfied	59	51	66	56	63	62	58
Somewhat dissatisfied	21	29	17	21	12	9	23
Very dissatisfied	3	7	2	3	2	2	4

Table 1-6

OW-Q.1b

CONNECTION BETWEEN DOING JOB WELL AND GETTING WHAT YOU WANT OUT OF LIFE: JAPAN OFFICE WORKERS BY AGE AND JOB LEVEL

	Total Office Workers	Age				Job Level	
		18-29	30-39	40-49	50 +	Managerial	Non-Managerial
Base	1000	252	289	276	164	151	849
	%	%	%	%	%	%	%
Great deal	31	25	30	39	33	42	30
Only some	51	57	54	46	47	38	54
Hardly at all	16	16	15	14	19	20	16
Not sure	1	2	1	1	1	1	1

Table 1-7

OW-Q.1b; CEO-Q.1b

CONNECTION BETWEEN DOING JOB WELL AND GETTING WHAT YOU WANT OUT OF LIFE: JAPAN OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers	Top Executives Answering About Their Employees
Base	1000	100
	%	%
Great deal	31	44
Only some	51	48
Hardly at all	16	7
Not sure	1	1

Table 1-8

OW-Q.2a, 2b, 2c, 2d;
CEO-Q.2a, 2b, 2c, 2d

OFFICE CHARACTERISTICS: IMPORTANCE AND PREVALENCE: JAPAN OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers		Top Executives	
	1000		100	
	Very Important to Them	Very True on Their Present Job	Very Important For Their Employees	Very True For Their Employees
	%	%	%	%
My job is secure from layoffs	79	50	44	47
My job is challenging	79	31	67	9
Top management provides clear goals and direction for the organization	79	27	67	28
I'm proud of the quality of the products and services this organization provides	79	35	52	26
Management provides me with the tools and resources to get my job done	76	38	37	27
Management recognizes my contributions	74	21	43	11
Management is sensitive to the need to balance job and family responsibilities	74	21	26	12
Employees at all levels are encouraged to work in teams	73	23	45	17
I can contribute significantly to my company	72	27	40	5

(Continued)

Table 1-8 (Continued)

OW-Q.2a, 2b, 2c, 2d;
CEO-Q.2a, 2b, 2c, 2d

OFFICE CHARACTERISTICS: IMPORTANCE AND PREVALENCE: JAPAN OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers		Top Executives	
Base:	1000		100	
	Very Important to Them	Very True on Their Present Job	Very Important For Their Employees	Very True For Their Employees
	%	%	%	%
Management is honest, upright, and ethical in its dealing with employees and the community at large	72	16	49	20
The pay is good	71	15	42	7
The employee benefits -- such as insurance and vacation -- are good	70	24	24	5
Management recognizes and supports the need to protect the natural environment	63	15	30	18
Employees at all levels are encouraged to participate in problem-solving	61	18	25	14
I'm encouraged to take risks	52	18	32	15
There are ample opportunities for me to move up to a better position in my company	43	19	40	11

Table 1-9

OW-Q.2a, 2b, 2c, 2d

OFFICE CHARACTERISTICS: ASPIRATION GAPS, JAPAN OFFICE WORKERS BY AGE AND JOB LEVEL

	Total Office Workers	Age				Job Level	
		18-29	30-39	40-49	50 +	Managerial	Non-Managerial
Base	1000	252	289	276	164	151	849
	%	%	%	%	%	%	%
Management is honest, upright, and ethical in its dealing with employees and the community at large	-56	-50	-60	-56	-61	-43	-58
The pay is good	-56	-54	-63	-56	-50	-42	-58
Management recognizes my contributions	-53	-57	-53	-52	-52	-45	-55
Management is sensitive to the need to balance job and family responsibilities	-53	-56	-51	-53	-51	-44	-54
Top management provides clear goals and direction for the organization	-52	-45	-58	-54	-51	-45	-54
Employees at all levels are encouraged to work in teams	-50	-47	-52	-52	-51	-42	-52
Management recognizes and supports the need to protect the natural environment	-48	-41	-48	-50	-53	-38	-49
My job is challenging	-48	-51	-55	-48	-35	-39	-50
The employee benefits -- such as insurance and vacation -- are good	-46	-40	-49	-47	-50	-49	-46
I can contribute significantly to my company	-45	-41	-57	-45	-36	-47	-46

(Continued)

Table 1-9 (Continued)

OW-Q.2a, 3b, 2c, 2d

OFFICE CHARACTERISTICS: ASPIRATION GAPS,
JAPAN OFFICE WORKERS BY AGE AND JOB LEVEL

	Total Office Workers	Age				Job Level	
		18-29	30-39	40-49	50 +	Managerial	Non-Managerial
Base	1000	252	289	276	164	151	849
	%	%	%	%	%	%	%
I'm proud of the quality of the products and services this organization provides	-44	-41	-47	-47	-42	-37	-46
Employees at all levels are encouraged to participate in problem-solving	-43	-47	-42	-42	-37	-27	-44
Management provides me with the tools and resources to get my job done	-38	-32	-41	-40	-39	-24	-39
I'm encouraged to take risks	-34	-30	-31	-34	-43	-32	-34
My job is secure from layoffs	-29	-32	-33	-28	-21	-25	-29
There are ample opportunities for me to move up to a better position in my company	-24	-26	-21	-20	-32	-17	-26

Table 1-10

OW-Q.2a, 3b, 2c, 2d;
CEO-Q.1a, 2b, 2c, 2d

OFFICE CHARACTERISTICS: ASPIRATION GAPS, JAPAN OFFICE WORKERS BY SIZE OF ORGANIZATION

		Size of Organization			
	Total	100 or Less	101-500	501-5000	Over 5000
Base	1000	170	201	220	178
	%	%	%	%	%
Management is honest, upright, and ethical in its dealing with employees and the community at large	-56	-54	-53	-59	-67
The pay is good	-56	-51	-66	-62	-55
Management recognizes my contributions	-53	-52	-59	-59	-49
Management is sensitive to the need to balance job and family responsibilities	-53	-54	-56	-50	-47
Top management provides clear goals and direction for the organization	-52	-56	-54	-54	-50
Employees at all levels are encouraged to work in teams	-50	-49	-52	-51	-45
Management recognizes and supports the need to protect the natural environment	-48	-42	-50	-52	-53
My job is challenging	-48	-48	-41	-59	-54
The employee benefits -- such as insurance and vacation -- are good	-46	-50	-49	-45	-37
I can contribute significantly to my company	-45	-48	-46	-47	-49

(Continued)

Table 1-10 (Continued)

OW-Q.2a, 3b, 2c, 2d;
CEO-Q.1a, 2b, 2c, 2d

OFFICE CHARACTERISTICS: ASPIRATION GAPS, JAPAN OFFICE WORKERS BY SIZE OF ORGANIZATION

		Size of Organization			
	Total	100 or Less	101-500	501-5000	Over 5000
Base	1000	170	201	220	178
	%	%	%	%	%
I'm proud of the quality of the products and services this organization provides	-44	-48	-41	-49	-50
Employees at all levels are encouraged to participate in problem-solving	-43	-40	-43	-38	-46
Management provides me with the tools and resources to get my job done	-38	-27	-44	-42	-39
I'm encouraged to take risks	-34	-35	-34	-37	-37
My job is secure from layoffs	-29	-34	-34	-24	-15
There are ample opportunities for me to move up to a better position in my company	-24	-16	-25	-30	-23

Table 1-11

OW-Q.2a, 2b, 2c, 2d;
CEO-Q.2a, 2b, 2c, 2d

OFFICE CHARACTERISTICS: ASPIRATION GAPS, JAPAN OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers	Top Executives
Base	1000 %	100 %
Management is honest, upright, and ethical in its dealing with employees and the community at large	-56	-29
The pay is good	-56	-35
Management recognizes my contributions	-53	-32
Management is sensitive to the need to balance job and family responsibilities	-53	-14
Top management provides clear goals and direction for the organization	-52	-39
Employees at all levels are encouraged to work in teams	-50	-28
Management recognizes and supports the need to protect the natural environment	-48	-12
My job is challenging	-48	-58
The employee benefits -- such as insurance and vacation -- are good	-46	-19
I can contribute significantly to my company	-45	-35

(Continued)

Table 1-11 (Continued)

OW-Q.2a, 2b, 2c, 2d;
CEO-Q.2a, 2b, 2c, 2d

OFFICE CHARACTERISTICS: ASPIRATION GAPS, JAPAN OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers	Top Executives
Base	1000	100
	%	%
I'm proud of the quality of the products and services this organization provides	-44	-26
Employees at all levels are encouraged to participate in problem-solving	-43	-11
Management provides me with the tools and resources to get my job done	-38	-10
I'm encouraged to take risks	-34	-17
My job is secure from layoffs	-29	+3
There are ample opportunities for me to move up to a better position in my company	-24	-29

2: HOW OFFICE WORKERS WORK

The Participative Workplace

The aspiration gap data reveal that office workers are largely unfulfilled on participative workplace characteristics, as they report the following gaps: recognition of employee contributions (-53 points), job challenge (-48), contributing significantly to the company (-45) and participation in problem-solving (-43). In yet another measure of the extent to which they participate in the workplace, office workers were asked to characterize the degree of initiative they currently have in their job and that which they would prefer. Without a doubt, Japanese office employees prefer a more participative work environment, consisting of more autonomy and independence. Just over one-third (34%) say that on their job they typically "identify problems or goals, and get them solved or achieved"; but a higher 49% of all Japanese office workers state that they would prefer this way of working. Thirty-seven percent report that they are "given a problem to solve or a goal to achieve, and they figure out what to do and how to do it;" but a lower 29% would prefer to perform their work in this manner; almost one-fourth (23%) of Japanese office workers report that they are "pretty much told what to do and how to do it," yet only 13% report that they would prefer to be working this way (Table 2-1).

Among the youngest age group, those office workers age 18 to 29, fewer prefer to work independently than their older counterparts -- only 44% prefer to "identify problems or goals, and get them solved or achieved," compared to 54% of those age 30 to 39, and 50% of both those age 40 to 49 and those age 50 or older (Table 2-2). However, 18 to 29 year-olds are also less likely to report that this mode of work best describes their current job than are older employees. Not surprisingly, those office workers with managerial level positions both have and prefer a more independent work mode than their non-managerial counterparts by a wide margin -- fully 62% of managers say they identify and solve their own problems and goals (61% prefer it that way), compared to only 30% of non-managers and 47% who would prefer to work more independently (Table 2-3). Similarly, 26% of non-managerial employees say they are "told what to do," and 14% say they prefer this mode, compared to only 8% of managers who report that this best describes their work environment and 8% who state this as their preference.

Being encouraged to work as part of a team is of relatively high importance to office workers in Japan, and a substantial 50-percentage-point aspiration gap exists between the degree of importance this holds for Japanese office workers and the extent to which they find it is true for them. Japanese office workers report that they spend an average of 50% of their time working alone (Table 2-4). An average of 22% of their time is spent working informally with others, and more than one-quarter (28%) of their time is spent working on a formal team. These percentages are fairly consistent across age and job level (Table 2-5).

Total Quality Management

Total quality management, or TQM, though traditionally applied in industrial environments, is becoming increasingly accepted in all types of corporate settings. From the findings, it is clear that TQM is not yet established in the Japanese office workplace. Moreover, office workers and their bosses are not fully in accord as to which aspects of TQM would be desirable to implement and which would not (Table 2-6):

-- Just under two out of three (63%) Japanese office workers and 72% of top executives state that their companies currently "foster the notion of 'continuous improvement' of the work and the way things are done in the office"; an overwhelming 85% of office workers and 95% of their bosses say they would favor such an initiative.

-- Almost half (48%) of office workers and one-third (34%) of their bosses say their organizations currently measure customer satisfaction, either internally or externally; fully 73% of office workers and 82% of top executives would favor such a move.

-- But office workers tend to favor the concept of linking incentive compensation to the quality of their work more enthusiastically than their bosses (66% vs. 43%). Thirty-nine percent of office workers report their company now does so; only 13% of top executives say they have implemented this measure.

-- Thirty-three percent of office workers but a lower 17% of top executives say their companies have a "do-it-right-the-first-time" philosophy; office workers are more enthusiastic about this measure than top executives (54% of office workers favor, compared to 32% of executives).

-- When it comes to measuring office worker productivity, one-third of office workers and just over one-quarter of executives claim they currently do so. Just under half (49%) of office workers support such a move, while nearly four in five (79%) top executives favor productivity measurement.

-- By way of comparison, a pre-TQM measurement of productivity, the linkage of workers' incentive compensation to the quantity of work, is more popular among workers (66% favor) than executives (32% favor), and workers report this occurs more frequently than their bosses (35% and 14% respectively).

Overall, private-sector organizations -- especially in service industries -- appear to take the lead over government in TQM implementation (Table 2-7).

Productivity

Fewer than one-quarter (23%) of Japanese office workers feel that they "certainly do as much as they can" in their current jobs, more say they "probably do as much as they can (44%), while almost one-third of all office workers (32%) feel that they "could probably do more" (Table 2-8). Those age 50 and over are more likely than younger office workers to feel they're doing as much as they can (29% of older workers feel "pushed to the wall"), and managerial level employees (41%) are more likely than non-managerial level employees (31%) to feel that they could do more. Top executives (17%), facilities managers (12%) and interior designers (13%) all underestimate the extent to which office workers feel "pushed to the wall" (Table 2-9).

Hours Put In

Japanese office workers say that they work a median of 45 hours per week -- a relatively long work week compared to other countries (Table 2-10). Though it has been shown that one-third of office workers believe their productivity could be increased, just over three out of five office workers (61%) feel that the hours they spend in their job are "just about right." Only 4% say that the hours they put in are too few, but one-third think these hours are "too much." Workers under age 50 and non-managerial workers feel more strongly than those 50 and over and managers that they work too many hours. Office workers in manufacturing companies report working the longest hours (48), those in government the least (44) (Table 2-11).

Office workers report that they spend a median of 3 hours per week in meetings; the majority of workers (55%) consider this to be "just right," and 15% consider it excessive (Table 2-12). Office workers age 18-29 spend slightly less time in meetings (2 hours) and are less likely to consider that excessive than older workers. As would be expected, managers spend more time in meetings (5 hours) than their non-managerial-level co-workers (3 hours), and are more likely to consider this to be "too much" (25% vs. 13%). Employees of larger organizations also spend more time in meetings than employees of smaller companies (Table 2-13), and are more apt to find this time excessive.

Computer Use

The number of office workers using distributed technology in the workplace in the form of a personal computer or terminal is relatively low in Japan (Table 2-14). Only 64% of all office workers use a PC or terminal and 36% say they do not use this technology in any form at all. In addition, only 9% of all office workers say they use a PC or terminal for 5 or more hours per day. Computer usage is concentrated among younger employees; the proportion using a terminal or PC at all is 69% among those 18-29, an even higher 75% among those 30-39, but only 59% among those 40-49 and 45% among those 50 and over. Similarly, the proportion using a computer 5 or more hours daily decreases from 16% among the youngest office workers to only 4% among the oldest. Most top executives in Japan (69%) do not have a computer or terminal in their office; 30% do (Table 2-15).

> **Observation:**
>
> **Japanese office workers report they spend proportionately more of their time working on teams than their counterparts in the EEC, the United States or Canada. Yet, the aspiration gap expressed by Japanese office workers on management encouragement of teamwork is substantial and much higher than anywhere else in the world. Contributing to this phenomenon may be the physical layout of the office space -- as open shared space predominates office design,**

the conception that workers are functioning as part of a team is easy to form. In fact, the kind of teamwork office workers in Japan want their managements to encourage may also encompass the concept of shared responsibility. After all, nearly one-quarter of Japanese office workers report that they are told what to do and how to do it -- more than in any other country tested by this year's OEI.

While the Japanese industrial environment may embody the principles of TQM and worker participation in decision-making, the Japanese office environment appears not to. But the appetite, as yet unfulfilled, is there. While taken as a whole TQM initiatives do not have the overwhelming support of Japan's office workers and top executives (indeed, the two groups quibble over which initiatives are desirable), the proportion of both office workers and their bosses who do support an initiative far outweighs the proportion who say the initiative has been implemented in their workplace. Thus, it would appear that TQM has plenty of room to grow in Japan's offices.

The difficulty in keyboarding Japanese characters may have prevented distributed technology from becoming more prevalent in the office workplace to date. Younger workers report a higher degree of computer usage than older workers, suggesting that technology will become more widely used as a generation that is more comfortable with it comes of age.

Table 2-1

OW-Q.16a, 16b

DEGREE OF INITIATIVE: JAPAN OFFICE WORKERS

	Total	
Base	1000	
	Best Describes %	Prefer %
You're pretty much told what to do and how to do it	23	13
You're given a problem to solve or a goal to achieve, and you figure out what to do and how to do it	37	29
You identify problems or goals, and get them solved or achieved	34	49
Combination	4	2
Not sure	2	7

OW-Q.16a, 16b

Table 2-2

DEGREE OF INITIATIVE: JAPAN OFFICE WORKERS BY AGE

			Age							
	Total		18-29		30-39		40-49		50+	
Base	1000		252		289		276		164	
	Des-cribes	Prefer	Des-cribes	Prefer	Des-cribes	Prefer	Des-cribes	Prefer	Des-cribes	Prefer
	%	%	%	%	%	%	%	%	%	%
You're pretty much told what to do and how to do it	23	13	36	17	17	10	18	13	21	16
You're given a problem to solve or a goal to achieve, and you figure out what to do and how to do it	37	29	35	28	45	32	33	27	31	26
You identify problems or goals, and get them solved or achieved	34	49	23	44	32	54	42	50	44	50
Combination	4	2	3	3	4	2	5	3	*	-
Not sure	2	7	2	8	1	3	2	8	4	8

---

* Less than 0.5%.

Table 2-3

OW-Q.16a, 16b

DEGREE OF INITIATIVE: JAPAN OFFICE WORKERS BY JOB LEVEL

	Total		Job Level			
			Managerial		Non-Managerial	
Base:	1000		151		849	
	Best Describes %	Prefer %	Best Describes %	Prefer %	Best Describes %	Prefer %
You're pretty much told what to do and how to do it	23	13	8	8	26	14
You're given a problem to solve or a goal to achieve, and you figure out what to do and how to do it	37	29	25	24	39	29
You identify problems or goals, and get them solved or achieved	34	49	62	61	30	47
Combination	4	2	4	2	4	2
Not sure	2	7	1	5	3	7

Table 2-4

OW-Q.17

PROPORTION OF WORK WEEK SPENT WORKING ALONE, INFORMALLY WITH OTHERS, AND ON FORMAL TEAMS: JAPAN OFFICE WORKERS

	Total
Base	1000
Mean % Time Working:	
Alone	50
Informally with others	22
On formal teams	28

Table 2-5

OW-Q.17

PROPORTION OF WORK WEEK SPENT WORKING ALONE, INFORMALLY WITH OTHERS AND ON FORMAL TEAMS: JAPAN OFFICE WORKERS BY AGE AND JOB LEVEL

	Total Office Workers	Age				Job Level	
		18-29	30-39	40-49	50 +	Managerial	Non-Managerial
Base	1000	252	289	276	164	151	849
	%	%	%	%	%	%	%
Mean % Time Working:							
Alone	50	50	52	49	47	51	49
Informally with others	22	20	20	26	23	25	21
On formal teams	28	30	29	25	30	24	29

Table 2-6

OW-Q.4, 5
CEO-Q.5a, 5b

TQM INITIATIVES: JAPAN OFFICE WORKERS AND TOP EXECUTIVES

	Office Workers		Top Executives	
Base:	1000		100	
	Does %	Favor %	Organization Does %	Would Favor %
Foster the notion of "continuous improvement" of the work and the way things are done in the office	63	85	72	95
Measure the satisfaction of your office's customers or clients, either external or within the organization	48	73	34	82
Offer its office workers incentive compensation linked to the quality of their work	39	66	13	43
Have a "do-it-right-the-first-time" philosophy for office work	33	54	17	32
Measure office worker productivity	33	49	26	79
Offer its office workers incentive compensation linked to the quantity of their work	35	66	14	32

OW-Q.4, 5

Table 2-7

TQM INITIATIVES: JAPAN OFFICE WORKERS BY TYPE OF ORGANIZATION

			Type of Organization							
	Total		Manufacturing		Service		Non-profit		Government	
Base:	1000		321		448		44		114	
	Does	Favor	Does	Favor	Does	Favor	Does	Favor	Does	Favor
	%	%	%	%	%	%	%	%	%	%
Foster the notion of "continuous improvement" of the work and the way things are done in the office	63	85	65	85	64	85	67	81	51	83
Measure the satisfaction of your office's customers or clients, either external or within the organization	48	73	48	72	52	77	54	65	33	60
Offer its office workers incentive compensation linked to the quality of their work	39	66	38	65	46	71	21	60	21	50
Have a "do-it-right-the-first-time" philosophy for office work	33	54	33	55	35	56	21	60	31	48
Measure office worker productivity	33	49	33	53	36	50	28	49	21	39
Offer its office workers incentive compensation linked to the quantity of their work	35	66	33	62	41	69	25	65	23	60

Table 2-8

OW-Q.3b

PRODUCTIVITY: WHETHER OFFICE WORKERS DO AS MUCH AS THEY CAN: JAPAN OFFICE WORKERS BY AGE AND JOB LEVEL

	Total Office Workers	Age				Job Level	
		18-29	30-39	40-49	50 +	Managerial	Non-Managerial
Base	1000	252	289	276	164	151	849
	%	%	%	%	%	%	%
Certainly do as much as can	23	20	23	20	29	18	24
Probably do as much as can	44	46	42	47	39	39	44
Could probably do more	32	33	34	31	30	41	31

Table 2-9

OW-Q.3b; CEO-Q.3b;
FM-Q.4; ID-Q.3b

PRODUCTIVITY: WHETHER OFFICE WORKERS DO AS MUCH AS THEY CAN: JAPAN OFFICE WORKERS AND EXECUTIVES

	Office Workers	Top Executives Answering About Their Employees	Facilities Managers Answering About Their Employees	Interior Designers About Most Office Employees
Base	1000	100	100	100
	%	%	%	%
Certainly do as much as can	23	17	12	13
Probably do as much as can	44	49	46	44
Could probably do more	32	34	40	30
Not sure	1	-	2	13

Table 2-10

OW-Q.F4a, F4b

HOURS WORKED IN TYPICAL WEEK: JAPAN OFFICE WORKERS BY AGE AND JOB LEVEL

		Age				Job Level	
	Total	18-29	30-39	40-49	50 +	Managerial	Non-Managerial
Base	1000	252	289	276	164	151	849
	%	%	%	%	%	%	%
Median hours work per week	45	45	45	45	43	45	45
Consider that:							
Too much	33	34	34	35	30	31	34
Too little	4	6	5	1	4	6	4
Just right	61	59	60	61	63	62	61

OW-Q.F4a, F4b

Table 2-11

HOURS WORKED IN TYPICAL WEEK: JAPAN OFFICE WORKERS BY TYPE OF ORGANIZATION

		Type of Organization			
	Total	Manufacturing	Service	Non-profit	Government
Base	1000	321	448	44	114
	%	%	%	%	%
Median hours work per week	45	48	45	45	44
Consider that:					
Too much	33	35	34	16	32
Too little	4	3	4	12	2
Just right	61	61	59	72	63

Table 2-12

OW-Q.F4c, F4d

HOURS SPENT PER WEEK IN MEETINGS: JAPAN OFFICE WORKERS BY AGE AND JOB LEVEL

	Total Office Workers	Age 18-29	Age 30-39	Age 40-49	Age 50 +	Job Level Managerial	Job Level Non-Managerial
Base	1000	252	289	276	164	151	849
	%	%	%	%	%	%	%
Median hours per week in meetings	3	2	3	3	3	5	3
Consider that:							
Too much	15	6	20	18	17	25	13
Too little	16	18	17	14	14	14	16
Just right	55	60	52	52	58	57	55

Table 2-13

OW-Q.F4c, F4d

HOURS SPENT PER WEEK IN MEETINGS: JAPAN OFFICE WORKERS BY SIZE OF ORGANIZATION

		Size of Organization			
	Total	100 or Less	101-500	501-5000	Over 5000
Base	1000	170	201	220	178
	%	%	%	%	%
Median hours per week in meetings	3	2	3	3	4
Consider that:					
Too much	15	12	16	19	21
Too little	16	18	18	17	11
Just right	55	57	52	57	57

Table 2-14

OW-Q.15a, 15b

USE OF TERMINALS AND PCs: JAPAN OFFICE WORKERS BY AGE AND JOB LEVEL

	Total Office Workers	Age				Job Level	
		18-29	30-39	40-49	50 +	Managerial	Non-Managerial
Base	1000	252	289	276	164	151	849
	%	%	%	%	%	%	%
Total PC/Terminal Use	**64**	**69**	**75**	**59**	**45**	**63**	**64**
Use PC	20	19	24	21	13	23	20
Use terminal	15	22	16	12	10	9	16
Use both a terminal and a PC	26	27	30	23	21	30	25
Use equipment that serves as both a terminal and a PC	2	1	5	3	*	2	2
Don't use	36	30	25	41	55	37	36
Use 5+ hours/day	9	16	8	4	4	5	9
Median hours/day	2	3	2	1	1	1	2

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* Less than 0.5%.

Table 2-15

CEO-Q.F5

HAVE TERMINAL OR PC IN OFFICE: JAPAN
TOP EXECUTIVES

	Top Executives
Base	100
	%
Total PC/Terminal in Office	30
Have PC	6
Have terminal	12
Have both (vol.)	12
Don't have	69

3: HOW THE PHYSICAL ENVIRONMENT SUPPORTS THE OFFICE WORKER

Usual Workspace Arrangements

Partitioned offices have yet to make inroads into Japanese office design. Almost nine out of ten (87%) office workers occupy open space, without partitions or doors (Table 3-1). Only 5% report that they work in a "private office with a door," and 7% say they work in "a partitioned space divided with screens or panels that's part of a so-called open plan system." Roughly half of those workers with "private offices" say they share the space with someone else. This pattern generally holds true regardless of the size of the company, and varies little by type of industry, though those employees working for the government seem more likely to have some form of private office, be it shared or as sole occupant (Table 3-2). As would be expected, managerial level employees are more likely to have a private office with a door (13%); 9% of managers report that they are the only occupant of such offices. Almost nine in ten non-managers work in "open space," but as many as 76% of managers also work in open space.

Facilities managers report that a mean of 13% of the office employees in their organization have some type of private office, 21% have partitioned space, and 67% share open space (Table 3-3). When asked for their expectations five years from now, facilities managers anticipate some change -- they still report that on average 13% will have some type of private office, but that partitioned space will increase to a mean of 30% of office employees, at the expense of open space, which will decrease to 60%.

When asked about the office facilities planned by their firm in 1990, interior designers paint a different picture. While they generally agree with facilities managers and office workers in describing a very low percentage of space devoted to private offices (9%), designers suggest that a far greater proportion of space in their designs is partitioned (Table 3-4). Designers report that a mean of 48% of the space their firm planned last year was partitioned space, and a mean of 44% was open space. In five years, interior designers expect partitioned space to dominate office layouts -- they predict a mean of 56% of the space they design will be so allocated. They also anticipate an increase in the amount of space for private offices (a mean of 16%), while open space will become less popular (28%).

Standards Program and Choice in Workspace Details

A majority of Japanese office workers (60%) report that their job "entitles them to certain types of workspace, furniture and accessories" (Table 3-5). Just under four in ten (39%) say that this is a formal policy enacted by their company. Nearly four in five (78%) say they would favor a formal standards program. Not surprisingly, seven out of ten managers say their job entitles them to certain types of furniture and workspace; 52% say this is the result of a formal program. Fewer non-managers (59%) report that their job entitles them to certain standards; 38% say this is the result of a formal program. Non-managers are as likely as managers to favor a formal standards program.

A majority of facilities managers also say their organizations have a standards program either organization-wide or in same locations (80%) (Table 3-6). Just over one half (52%) think employees would favor a formal standards program.

Interior designers are split as to the pervasiveness of standards program in the office workplace -- just over one-quarter (28%) of interior designers report that practically all of their clients have a formal standards program (Table 3-7); 37% say that only some of their clients have a formal program, and 26% say that practically none of their clients have such a program. More than half of all designers think that most of their clients' employees would favor a standards program.

A razor-thin majority of Japanese office workers (51%) say they have no choice in their workspace furniture or accessories; 46% report they have some choice (Table 3-8). Not surprisingly, managerial employees have more choice in the details of their workspace than non-managerial workers. Over seven out of ten facilities managers (71%), report that the office employees of their organization have no choice on the details of their work space (Table 3-9). A majority of interior designers (53%) say that none of their clients allow their employees any choice in the detail of their workspace; just over one-quarter (28%) say some of their clients allow their employees a choice, and only 14% say that practically all of their clients allow employees a choice (Table 3-10).

Specific Features of the Workspace

The findings reveal a considerable shortfall between office workers' expectations for their personal workspace and the reality they confront in the office every day. Tables 3-11 and 3-12 array seven items measured in the OEI, demonstrating on each a considerable gap between those who say it is "very important" to their productivity and those who claim it is "very true" in the job they have now:

-- Of most concern are two items which directly reflect a shortage of available space -- "adequate file and storage space" and "enough worksurface space to display or spread out work." Almost three-quarters (72%) of office workers say that adequate file space is "very important" to their being able to do as much work as they can, yet only 23% say this is "very true" for them, leaving a substantial "gap" of 49 percentage points (Table 3-12). Non-managers and government employees tend to experience the largest gaps. Similarly, 75% say that having enough worksurface is "very important", but only 30% say this is "very true" for them in their current job, leaving a gap of 45 points; non-managerial employees, government and service sector employees experience the largest gaps for this item.

-- "A comfortable chair that can be adjusted to your needs" is "very important" for 69% of office employees, and is considered "very true" by only 27% (a gap of 42 points). Managerial level employees have substantially less of a problem with this item.

-- "Comfortable heating and air conditioning where you work" has a gap of 40 points (85% very important, 45% very true) among the total office worker population, with the largest gaps among non-managers and government employees.

-- 57% report that "enough privacy and quiet" is very important to their productivity, yet only 23% say this is very true, for a gap of 34 points. Interestingly, this gap is identical for both managers and non-managers.

-- "Proper lighting" has a 32-point gap (87% very important, 55% very true). Government workers and non-managers experience the largest gaps.

-- "Adequate meeting space in or near your office or workspace" has a 23-point gap (69% very important, 46% very true), and is primarily a problem for government employees.

Facilities managers also tend to recognize that office workers experience significant gaps between the importance they attach to these features and the realities they face (Tables 3-13, 3-14). They estimate quite accurately the shortfalls office workers express on having a comfortable chair, proper lighting, comfortable heat and air conditioning, storage space and adequate meeting space near their office, but they underestimate the degree of frustration office workers express on privacy and quiet and having enough worksurface.

Interior designers reflect office workers' gaps accurately on heating and air conditioning, lighting, privacy and quiet, and overestimate office worker frustration on chairs, worksurface space, storage space and meeting space.

Common Facilities

Though individual workspace may be at a premium in Japan, substantial numbers of office workers agree that their organization's facilities include common areas set aside for specific functions. More than half (53%) of office workers report that their organization has set aside specific areas "other than the cafeteria or conference rooms where employees can get together to meet and talk informally" (Table 3-15). Almost half (49%) also say that their organization has "areas specifically set aside for training," and just over two in five (42%) say their company has "rooms or other areas set aside for ongoing work on specific projects." Only 3% of office workers say that their organization "provides areas set aside for child care."

Not surprisingly, such common areas are not offered at smaller organizations as readily as at larger companies. Most dramatically, only 19% of companies with 100 or fewer employees have dedicated training areas, compared to 76% of companies with over 5,000 employees. Less than one-third (30%) of these smaller organizations offer areas set aside for work on specific projects, while over half (52%) of organizations employing more than 5,000 employees include such areas in their facilities. Two in five (40%) smaller companies offer areas other than the cafeteria where employees can talk or meet, compared to two-thirds (66%) of the largest organizations employing more than 5,000 workers.

On all common areas except those set aside for training, facilities managers' reports are similar to these of office workers. A greater proportion of facilities managers report that their organization offers training areas (72%) (Table 3-16). Just over half (52%) say their organization has areas set aside for ongoing work on specific projects, and 51% report their facility includes areas other than the cafeteria for informal talks or meetings.

When asked how many of their clients offer office workers such common areas, only a small percentage of interior designers say that "the majority" of their clients offer training areas (8%), project areas (12%), informal meeting areas (12%) or areas set aside for child care (1%) (Table 3-17). A greater proportion say that "a substantial number" of their clients offer office workers these common areas, but most designers report that "only a few" or "none" of their clients offer such facilities.

Hazards in the Office Workplace

Office workers were asked to what extent they consider each of five potential hazards a serious problem at their office location. Eyestrain tops the list, as 62% of office workers consider it to be a "very" or "somewhat serious" problem (Table 3-18). The quality of the air you breathe is considered serious by just over half, or 53%, of office workers. Lower on the list, only 35% say the risk of repetitive strain injuries, such as wrist injuries from using a computer keyboard is a serious problem, closely followed by potential harmful radiation from video display terminals (33%). Reported as least serious is exposure to hazardous material in your building, with one-quarter (25%) of office workers saying this is a serious problem. Government employees report the greatest degree of concern about radiation from VDTs.

Non-managerial level employees are far more concerned about each of these potential hazards than managers (Table 3-19). Employees that work for the largest organizations are less concerned than average about eyestrain; those in the smallest organizations are less concerned than average about air quality.

Table 3-20 illustrates concern over repetitive strain injury among computer users. As would be expected, the 9% of office workers who spend five or more hours per day on a PC or terminal are far more concerned about RSI than either office workers overall or those that make any use of a PC or terminal. Approximately equal proportions of all three categories identify RSI as a "very serious" problem (17% of office workers overall, 17% of general computer users, and 20% of those using a computer five or more hours per day). However, 18% of all office workers and 22% of the general computer-users group say that they consider RSI to be a "somewhat serious" problem, rising to 42% among the frequent computer-user group.

Top executives and facilities managers seriously underestimate the concern their office workers have for these hazards in the workplace (Table 3-21). While over three out of five office workers (62%) consider eyestrain a "very" or "somewhat serious" problem, only about half as many, or 32%, of top executives and less than three in ten facilities managers (29%) consider eyestrain a serious problem for their office workers. Likewise, less than one-third (30%) of both top executives and facilities managers rate air quality as a serious problem, compared to 53% of office workers. Repetitive strain injury, radiation hazards from video display terminals, and hazardous material in the office building are similarly under-rated as risks for their employees by both groups. Interior designers, on the other hand, voice an even stronger and more vociferous concern over these risks than office workers; more than four out of five (82%) consider eyestrain a serious problem, more than half (65%) report that air quality and repetitive strain injury (56%) are serious problems for office workers, 40% consider radiation from VDTs serious, and 36% rate exposure to hazardous material in the office building serious.

Observation:

Interior designers, on the cutting edge of office design, depict a change in the way in which office space is planned -- away from open space and toward partitioned designs. They are allocating more design space for such partitioned plans in their current designs than workers presently enjoy, and they expect this trend to continue. Office workers can look forward to the increased privacy afforded by partitions. The low usage of space for private offices reported by all three groups is expected to remain constant, and may well be attributable to the high cost of space throughout urban Japan, not corporate preference.

It is likely that space constraints in Japan's cities are also a major factor in shortcomings of the personal workspace -- such as insufficient worksurface and inadequate file or storage space. The prevalence of open space layouts in Japanese offices has probably contributed heavily to problems with quiet and privacy, and as partitioned space becomes more common some of these problems should subside.

Though child care facilities are rare in Japan, there would also seem to be less of a need for such facilities than in the United States, for example. Only 26% of office workers in Japan, compared with a higher 34% in the U.S., report there are children under age 12 in their household. Of those, 37% are married with their spouse working full-time and another 10% have a spouse working part-time, for a total of 47% of those with children in the household, or 12% of all office workers -- compared with 23% of all office workers in the U.S. -- who might need to make child care arrangements of some kind.

Table 3-1

OW-Q.10, 11

USUAL WORKSPACE ARRANGEMENT: JAPAN OFFICE WORKERS BY SIZE OF ORGANIZATION

		Size of Organization			
	Total	100 or Less	101-500	501-5000	Over 5000
Base	1000	170	201	220	178
	%	%	%	%	%
Private	5	7	4	8	5
Share with others	3	3	1	5	2
Only occupant	3	4	2	3	3
Partitioned	7	10	8	8	5
Open with others	87	83	88	84	90
Other	*	-	-	*	-

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* Less than 0.5%.

Table 3-2

OW-Q.10, 11

USUAL WORKSPACE ARRANGEMENT: JAPAN OFFICE WORKERS BY JOB LEVEL AND TYPE OF ORGANIZATION

	Total	Job Level		Type of Organization			
		Managerial	Non-Managerial	Manufacturing	Service	Non-Profit	Government
Base	1000	151	849	321	448	44	114
	%	%	%	%	%	%	%
Private	5	13	4	3	6	5	9
Share with others	3	4	2	2	3	-	3
Only occupant	3	9	2	1	3	5	6
Partitioned	7	11	7	7	9	2	4
Open with others	87	76	89	89	85	93	87
Other	*	-	*	-	*	-	-

---

*Less than 0.5%.

Table 3-3

FM-Q.7a, 7b

USUAL WORKSPACE ARRANGEMENTS:
JAPAN FACILITIES MANAGERS

	Mean Percentage	
	Now	In 5 Years
Base: 100	%	%
Private offices with doors	13	13
Partitioned	21	30
Open with others	67	60

Table 3-4

ID-Q.6a, 6b

USUAL WORKSPACE ARRANGEMENTS: JAPAN INTERIOR DESIGNERS

	Mean Percentage	
	Now	In 5 Years
Base: 100	%	%
Private offices with doors	9	16
Partitioned	48	56
Open with others	44	28

Table 3-5

OW-Q.12b; 12c, 12d

STANDARDS PROGRAM: JAPAN OFFICE WORKERS BY JOB LEVEL

		Job Level	
	Total	Managerial	Non-Managerial
Base	1000	151	849
	%	%	%
Job entitles them to certain types of workspace, furniture, accessories	60	70	59
Formal policy	39	52	38
Just works out	17	12	18
Both	2	3	1
Favor formal program	78	74	79
Oppose formal program	11	18	10

Table 3-6

FM-Q.8b, 8c

STANDARDS PROGRAMS: JAPAN FACILITIES MANAGERS

	Facilities Managers
Base	100
	%
Organization has standards program	64
Does not have	20
In some locations but not others	16
Not sure	-
Think Employees:	
Favor standards program	52
Oppose	8
Not sure	40

Table 3-7

ID-Q.7b, 7c

STANDARDS PROGRAMS: JAPAN INTERIOR DESIGNERS

	Interior Designers
Base	100
	%
Practically all clients have standards program	28
Only some	37
Practically none	26
Think most clients' employees would favor a standards program	55
Think most would oppose	15
Not sure	30

OW-Q.12a

Table 3-8

CHOICE IN WORKSPACE DETAILS: JAPAN OFFICE WORKERS BY JOB LEVEL

		Job Level	
	Total	Managerial	Non-Managerial
Base	1000	151	849
	%	%	%
Some choice	46	63	43
No choice	51	35	54
Not sure	3	2	3

Table 3-9

FM-Q.8a

CHOICE IN WORKSPACE DETAILS: JAPAN FACILITIES MANAGERS

	Total
Base	100
	%
Some choice	28
No choice	71
Not sure	1

Table 3-10

ID-Q.7a

CHOICE IN WORKSPACE DETAILS: JAPAN INTERIOR DESIGNERS

	Total
Base	100
	%
Practically all clients allow employees some choice	14
Only some	28
Practically none	53

Table 3-11

OW-Q.9a, 9b

FEATURES OF WORKSPACE: JAPAN OFFICE WORKERS

Base:	Total Office Workers 1000	
	Very Important %	Very True %
Proper lighting	87	55
Comfortable heating and air conditioning where you work	85	45
Enough worksurface space to display or spread out work	75	30
Adequate storage and file space	72	23
A comfortable chair that can be adjusted to your needs	69	27
Adequate meeting space in or near your office or workspace	69	46
Enough privacy and quiet	57	23

Table 3-12

OW-Q.9a, 9b

GAPS ON WORKSPACE FEATURES: JAPAN OFFICE WORKERS BY JOB LEVEL AND TYPE OF ORGANIZATION

		Job Level		Type of Organization			
	Total	Non-Managerial	Managerial	Manufacturing	Service	Non-Profit	Government
Base	1000	151	849	321	448	44	114
	%	%	%	%	%	%	%
Adequate storage and file space	-49	-41	-50	-40	-50	-32	-63
Enough worksurface space to display or spread out work	-45	-34	-47	-41	-49	-30	-52
A comfortable chair that can be adjusted to your needs	-42	-28	-44	-38	-42	-39	-43
Comfortable heating and air conditioning where you work	-40	-30	-42	-40	-41	-34	-46
Enough privacy and quiet	-34	-34	-34	-32	-34	-21	-34
Proper lighting	-32	-24	-34	-28	-34	-21	-41
Adequate meeting space in or near your office or workspace	-23	-18	-25	-21	-22	-21	-42

Table 3-13

FM-Q.6a, 6b
ID-Q.5a, 5b

FEATURES OF WORKSPACE: JAPAN
FACILITIES MANAGERS AND INTERIOR DESIGNERS

	Facilities Managers For Their Employees		Interior Designers for Employees of Their Clients	
Base:	100		100	
	Very Important	Very True	Very Important	Very True For Most
	%	%	%	%
Comfortable heating and air conditioning where you work	74	34	89	42
Proper lighting	72	45	89	52
A comfortable chair that can be adjusted to your needs	54	16	81	24
Adequate storage and file space	54	6	78	14
Adequate meeting space in or near your office or workspace	52	24	77	33
Enough worksurface space to display or spread out work	41	12	81	17
Enough privacy and quiet	20	6	54	17

Table 3-14

OW-Q.9a, 9b
FM-Q.6a, 6b
ID-Q.5a, 5b

GAPS ON WORKSPACE FEATURES: JAPAN OFFICE WORKERS, FACILITIES MANAGERS AND INTERIOR DESIGNERS

	Office Workers	Facilities Managers For Their Employees	Interior Designers For Employees of Their Clients
Base	1000	100	100
	%	%	%
Adequate storage and file space	-49	-48	-64
Enough worksurface space to display or spread out work	-45	-29	-64
A comfortable chair that can be adjusted to your needs	-42	-38	-57
Comfortable heating and air conditioning where you work	-40	-40	-47
Enough privacy and quiet	-34	-14	-37
Proper lighting	-32	-27	-37
Adequate meeting space in or near your office or workspace	-23	-28	-44

Table 3-15

OW-Q.14

COMMON FACILITIES OFFERED AT ORGANIZATIONS: JAPAN OFFICE WORKERS BY SIZE OF ORGANIZATION

	Total	Size of Organization			
		100 or Less	101-500	501-5000	Over 5000
Base	1000	170	201	220	178
	%	%	%	%	%
Organization's Facilities Include:					
Areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally	53	40	48	60	66
Areas specifically set aside for training	49	19	34	61	76
Rooms or other areas set aside for ongoing work on specific projects	42	30	38	48	52
Areas set aside for child care	3	1	4	1	5

Table 3-16

FM-Q.10

COMMON FACILITIES OFFERED AT ORGANIZATIONS: JAPAN FACILITIES MANAGERS

	Total
Base	100
	%
Organization's Facilities Include:	
Areas specifically set aside for training	72
Rooms or other areas set aside for on-going work on specific projects	52
Areas other than the cafeteria or conference rooms where employees can get together to meet and talk informally	51
Areas set aside for child care	-

ID-Q.8

Table 3-17

COMMON FACILITIES OFFERED AT ORGANIZATIONS: JAPAN INTERIOR DESIGNERS

	Interior Designers		
Base:	100		
	The Majority %	A Substantial Number %	Only A Few/ None %
How Many of your Clients' Organizations Offer Office Workers:			
Areas specifically set aside for training	8	18	72
Rooms or other areas set aside for ongoing work on specific projects	12	24	62
Area other than the cafeteria or conference rooms where employees can get together to meet and talk informally	12	22	65
Areas set aside for child care	1	-	95

Table 3-18

OW-Q.7

HAZARDS IN THE WORKPLACE: JAPAN OFFICE WORKERS BY TYPE OF ORGANIZATION

"Very" or "Somewhat Serious"

		Type of Organization			
	Total	Manufacturing	Service	Non-Profit	Government
Base	1000	321	448	44	114
	%	%	%	%	%
Eyestrain	62	65	59	49	68
The quality of the air you breathe	53	49	55	42	60
The risk of repetitive strain injuries, such as wrist injuries from a computer keyboard	35	35	38	21	34
Potential harmful radiation from video display terminals	33	30	33	23	46
Exposure to hazardous material in your building	25	22	28	10	27

OW-Q.7

Table 3-19

HAZARDS IN THE WORKPLACE: JAPAN OFFICE WORKERS BY JOB LEVEL AND SIZE OF ORGANIZATION

"Very" or "Somewhat Serious"

		Job Level		Size of Organization			
	Total	Managerial	Non-Managerial	100 or Less	101-500	501-5000	Over 5000
Base	1000	151	849	170	201	220	178
	%	%	%	%	%	%	%
Eyestrain	62	53	63	64	65	61	51
The quality of the air you breathe	53	38	56	43	53	53	54
The risk of repetitive strain injuries, such as wrist injuries from a computer keyboard	35	28	37	32	40	34	35
Potential harmful radiation from video display terminals	33	20	35	28	30	40	37
Exposure to hazardous material in your building	25	19	26	23	25	27	24

Table 3-20

OW-Q.7

REPETITIVE STRAIN INJURY:
JAPAN OFFICE WORKERS BY COMPUTER USE

	Total	Use Computer	Use Computer 5+ Hours a Day
Base	1000	642	79
	%	%	%
The risk of repetitive strain injury at your location is...			
Very serious	17	17	20
Somewhat serious	18	22	42
Not very serious	19	22	19
Not at all serious	42	37	19

Table 3-21

OW-Q.7; CEO-Q.7
FM-Q.5; ID-Q.4

HAZARDS IN OFFICE WORKPLACE: JAPAN OFFICE WORKERS AND EXECUTIVES

"Very" or "Somewhat Serious"

	Office Workers	Top Executives	Facilities Managers	Interior Designers
Base	1000	100	100	100
	%	%	%	%
Eyestrain	62	32	29	82
The quality of the air you breathe	53	30	30	65
The risk of repetitive strain injuries, such as wrist injuries from a computer keyboard	35	18	12	56
Potential harmful radiation from video display terminals	33	14	18	40
Exposure to hazardous material in your building	25	15	11	36

4: HOW THE PROFESSIONAL OFFICE ENVIRONMENT COMMUNITY RESPONDS

Issues Impacting Design

Top executives, facilities managers and interior designers were asked their opinion of the impact they expect various issues and concerns to have on facilities design over the next five years.

Not surprisingly, of primary importance to all three groups are telecommunications and computer needs; 86% of facilities managers, 95% of top executives and 92% of interior designers expect this to have "a great deal of impact" on design (Table 4-1). Space costs also figure highly in the expectations for the future, as 71% of facilities managers, 72% of top executives, and 82% of interior designers anticipate such costs to have "a great deal" of impact. The three groups diverge at this point, with facilities managers and top executives basically in agreement over the leading influences upon design directions.

Health and safety legislation and regulation is expected to have "a great deal of impact" by 49% of both top executives and facilities managers, and 58% of designers also predict that such regulations will affect the workplace design. The need to attract and retain skilled employees is recognized by 40% of facilities managers and 49% of top executives as influential; an overwhelming 72% of interior designers agree. An increasingly participative work environment is next on the list of items assessed as influential (37% of both top executives and facilities managers and 52% of interior designers), followed by costs for office furniture and equipment (25% of facilities managers, 20% of top executives and 32% of designers), the need to utilize existing furniture rather than purchase new furniture (25% of facilities managers, 31% of the designers but only 12% of top executives), worker desire for privacy (only 16% of facilities managers, but 27% of top executives and 42% of designers), and office worker involvement in the design of the work environment (11% of facilities managers, 21% of top executives and 35% of interior designers).

The Facilities Management Function

Almost half of top executives (47%) in Japan report their organizations have a full-time facilities management function, and 46% report that they have a part-time function (Table 4-2). However, by 57% to 20% Japanese bosses see this as more of an expense than an asset management tool. Over two in five (44%) also agree that facilities plans should be linked to the business plan "a great deal"; however, only 16% say they are linked to that extent.

The Use of Outside Design Professionals

Over two in five (44%) Japanese top executives say their firm routinely engages outside design professionals (Table 4-3). Of those who do, most are satisfied (18% say they are "very satisfied," 59% are "somewhat satisfied"); only 20% say they are dissatisfied.

A similar 43% of facilities managers say their firm regularly engages outside design professionals (Table 4-4). According to those who use them, design professionals exert little influence over the organization's furniture and equipment standards; 14% report that outside designers have a "great deal" of influence; 21% that they have "somewhat" of an influence, but fully 60% say they have "not too much" influence or "none at all." Regardless, facilities managers who use them report that for the most part they are satisfied with their use of designers (90% at least "somewhat satisfied," only 5% dissatisfied). Facilities managers who use outside design professionals report engaging them for design functions (60%), ongoing facilities management (40%), installation and project management (29%), and consultation (14%).

Table 4-1

FM-Q.14a
CEO-Q.16a
ID-Q.12a

ANTICIPATED IMPACT ON FACILITIES DESIGN: JAPAN FACILITIES MANAGERS, TOP EXECUTIVES, INTERIOR DESIGNERS

"A Great Deal of Impact"

	Facilities Managers	Top Executives	Interior Designers
Base	100	100	100
	%	%	%
Telecommunications and computer needs	86	95	92
Space costs	71	72	82
Health and safety legislation and regulation	49	49	58
The need to attract and retain skilled employees	40	49	72
An increasingly participative work environment	37	37	52
Cost for office furniture and equipment	25	20	32
The need to utilize existing furniture rather than purchase new furniture	25	12	31
Worker desire for privacy	16	27	42
Office worker involvement in the design of the work environment	11	21	35

Table 4-2

CEO-Q.12, 13, 14a, 14b

FACILITIES MANAGEMENT: JAPAN TOP EXECUTIVES

	Top Executives
Base	100
	%
Have full-time facilities management	47
Have part-time facilities management	46
View Facilities Design and Management:	
More as expense	57
More as asset management	20
Facilities Plans should be Linked to Business Plan:	
A great deal	44
Somewhat	50
Not very much	6
Not at all	-
Facilities Plans are Linked To Business Plan:	
A great deal	16
Somewhat	57
Not very much	20
Not at all	7

Table 4-3

CEO-Q.15a, 15b

USE OF OUTSIDE DESIGN PROFESSIONALS: JAPAN TOP EXECUTIVES

	Top Executives
Base	100
	%
Routinely engages outside design professionals	44
Does not engage	47
(Base: Engages outside design professionals)	(44)
Satisfaction with use of outside design professionals	
Very satisfied	18
Somewhat satisfied	59
Somewhat dissatisfied	20
Very dissatisfied	-

Table 4-4

FM-Q.13a, 13e

USE OF OUTSIDE PROFESSIONALS: JAPAN FACILITIES MANAGERS

	Facilities Managers
Base	100
	%
Routinely engages outside design professionals	43
Does not engage	52
(Base: Engages outside design professionals)	(43)
	%
Extent to which design professionals influence organization's furniture and equipment standards:	
Great deal	14
Somewhat	21
Not too much	37
Not at all	23
Satisfaction with use of outside design professionals	
Very satisfied	16
Somewhat satisfied	74
Somewhat dissatisfied	5
Very dissatisfied	-

APPENDIX A: METHODOLOGY

Japan Samples

-- Office Workers. Interviews were conducted with 1,000 office workers screened from a national sample of adults 18 years old and over. To be eligible for the study an office worker must have worked full-time in an office with 25 or more office workers employed at their branch or location and have worked in any office setting for at least six months. In screening office workers by these criteria, eligible adults in each contacted household were enumerated; in the event that more than one adult in the household was an eligible office worker, the one with the most recent birthday became the designated respondent. The sample from which eligible office workers were screened was drawn using directory-based telephone number selection with quotas set in Sapporo, Tokyo, Nagoya, Osaka, Hiroshima and Fukuoka. Interviews were conducted by telephone from 6:00 - 10:00 pm nightly. Interviews were conducted using a questionnaire designed to take 25 minutes to administer in Japanese -- the equivalent of a 20 minute questionnaire in English.

-- Top Executives and Facilities Managers. The samples of top executives (100) and facilities managers (100) were drawn from the same universe: the top 500 publicly - and privately-held corporations, non-profit organizations and governmental entities in Japan ranked by number of employees, as identified by updated business directories. In conformity with Japanese organizational structure, top executives include department managers or board members in charge of office facilities. Facilities managers include general office managers screened for facilities management responsibilities including office layout and purchase of furniture and office systems. Qualifying facilities managers must have had such responsibilities in any organization -- not necessarily with their current employer -- for a minimum of three years.

Interviews were conducted by telephone with executives in their offices during regular office hours using a questionnaire designed to take 20 minutes to administer in Japanese -- the equivalent of a 15-minute questionnaire in English.

-- Interior Designers. Interviews were conducted with 100 contract interior designers in firms listed by Steelcase Japan. In conformity with the structure of the design community in Japan, where few professionals are engaged solely in office design, designers in listed firms who have done an office design at least once in the past year were rendered eligible. As in other countries, only one designer could be interviewed per office, but various offices of the same firm in multiple geographic locations could be added to the list and treated as separate organizations.

Qualifying interior designers must have been doing "that kind of work" for at least five years in any firm.

Interviews were conducted by telephone with designers in their offices during regular hours, using a questionnaire designed to take 20 minutes to administer in Japanese -- the equivalent of a 15-minute questionnaire in English.

Table A-1

PROFILE OF JAPANESE OFFICE WORKERS

	Total
Base	1000
	%
Region	
Sapporo	10
Tokyo	40
Nagaya	10
Osaka	21
Hiroshima	10
Fukuoka	9
Sex	
Male	61
Female	39
Age	
18 to 20 years	4
21 to 24 years	12
25 to 29 years	13
30 to 34 years	13
35 to 39 years	13
40 to 49 years	25
50 to 64 years	17
65 and over	1
Median age	37
Income	
1.99m. yen or less	8
2.0 to 2.99m. yen	3
3.0 to 3.99m. yen	7
4.0 to 4.99m. yen	8
5.0 to 5.99m. yen	10
6.0 to 7.99m. yen	18
8.0m yen or more	31
Size of Organization	
100 or fewer employees	17
101 to 500	20
501 to 5,000	20
Over 5,000	17
Type of Organization	
Manufacturing	31
Services	45
Government	12
Nonprofit	4

(Continued)

Table A-1 (Continued)

PROFILE OF JAPANESE OFFICE WORKERS

	Total
Base	1000 %
Years in Workforce	
10 or more years	65
5 to 9 years	16
2 to 4 years	13
1 year or less	5
Median years in workforce	13
Years at Present Employer	
10 or more years	46
5 to 9 years	18
2 to 4 years	22
1 year or less	13
Median years with present employer	8
Years at Present Job	
10 or more years	28
5 to 9 years	18
2 to 4 years	34
1 year or less	21
Median years at Present Job	4

Marital Status	
Married	61
Divorced/Widowed/separated	2
Single/never married	37
Self-Description of Position	
Managerial	14
Technical	33
Secretarial/clerical	52
Union member	41
Children in household	26

Table A-2

PROFILE OF JAPANESE TOP EXECUTIVES

	Total
Base	100
	%
Age	
18 to 24 years	-
25 to 29 years	-
30 to 34 years	1
35 to 39 years	2
40 to 49 years	37
50 to 64 years	58
65 and over	-
Median age	50
Median years in workforce	28
Median years at present organization	26
Median years at present position	2
Number of Employees Employed by Organization Nationwide	
Less than 2,000	1
2,000 to 2,999	6
3,000 to 4,999	33
5,000 to 6,999	20
7,000 to 9,999	16
10,000 or more	23
Median	5,513

Table A-3

PROFILE OF JAPANESE FACILITIES MANAGERS

	Total
Base	100
	%
Age	
18 to 24 years	-
25 to 29 years	1
30 to 34 years	2
35 to 39 years	13
40 to 49 years	48
50 to 64 years	29
65 and over	1
Median age	46
Median years in workforce	24
Median years at present organization	20
Median years at present position	3
Number of Employees Employed by Organization Nationwide	
Less than 2,000	29
2,000 - 2,999	32
3,000 - 4,999	21
5,000 - 6,999	7
7,000 - 9,999	4
10,000 or more	7
Median number of employees nationwide	2,507
Median percentage of office workers	66
Median average gross square meters per work station	6

Table A-4

PROFILE OF JAPANESE INTERIOR DESIGNERS

	Total
Base	100
	%
Age	
18 to 24 years	3
25 to 29 years	18
30 to 34 years	16
35 to 39 years	5
40 to 49 years	31
50 to 64 years	23
65 and over	1
Median age	41
Median years employed as office design professional	11
Median years employed by current firm	13
Median number of employees in firm	8
Median number of employees solely in contract office interior design	5
Median number of design projects in past three years with 50+ workstations	4
Median square meters of average office interior project in 1990	788
Median average gross square meters per workstation, 1990 projects	7

Sampling Error

The results achieved from any sample survey are subject to sampling error. Sampling error is defined as the differences between the results obtained from the sample and those that would have been obtained had the entire population been surveyed. The size of sampling error varies both with the size of the sample and with the percentage giving a particular answer. The following table sets forth the range of error in samples of different sizes at different percentages of response:

APPROXIMATE SAMPLING TOLERANCES (AT 95% CONFIDENCE) TO USE IN EVALUATING PERCENTAGE RESULTS APPEARING IN THIS REPORT

Number of People Asked Question on Which Survey Result Is Based	Survey Percentage Result at 10% or 90%	Survey Percentage Result at 20% or 80%	Survey Percentage Result at 30% or 70%	Survey Percentage Result at 40% or 60%	Survey Percentage Result at 50%
2,000	1	2	2	2	2
1,500	2	2	2	3	3
1,000	2	2	3	3	3
900	2	3	3	3	3
800	2	3	3	3	3
700	2	3	3	4	4
600	2	3	4	4	4
500	3	4	4	4	4
400	3	4	4	5	5
300	3	5	5	6	6
200	4	6	6	7	7
100	6	8	9	10	10
50	8	11	13	14	14

For example, if the response for a sample size of 1,000 is 30%, in 95 cases out of 100 the response in the total population would be between 27% and 33%.

Note that survey results based on subgroups of small size can be subject to large sampling error.

The recommended allowances for sampling error were calculated based on single random sample.

Significance of Difference Between Proportions

The difference between the percentage response given by two independent samples to the same question may or may not be significant. To determine whether or not such a difference is indeed significant, the size of the samples involved and the percentage giving each response must be taken into account. The following table shows the margin of error that must be allowed for different sample sizes at different percentages of response:

APPROXIMATE SAMPLING TOLERANCES (AT 95% CONFIDENCE) TO USE IN EVALUATING DIFFERENCES BETWEEN TWO PERCENTAGE RESULTS APPEARING IN THIS REPORT

Approximate Sample Size of Two Groups Asked Question on Which Survey Result Is Based	Survey Percentage Result at 10% or 90%	Survey Percentage Result at 20% or 80%	Survey Percentage Result at 30% or 70%	Survey Percentage Result at 40% or 60%	Survey Percentage Result at 50%
2,000 vs. 2,000	2	2	3	3	3
1,000	2	3	4	4	4
800	3	3	4	4	4
500	3	4	4	5	5
300	4	5	6	6	6
200	4	6	7	7	7
100	6	8	9	10	10
50	9	11	13	14	14
1,000 vs. 1,000	3	4	4	4	4
800	3	4	4	5	5
500	3	4	5	5	5
300	4	5	6	6	6
200	5	6	7	7	8
100	6	8	9	10	10
50	9	11	13	14	14
800 vs. 800	3	4	4	5	5
500	3	4	5	5	6
300	4	5	6	7	7
200	5	6	7	8	8
100	6	8	10	10	10
50	9	11	13	14	14
500 vs. 500	4	4	6	6	6
300	4	6	7	7	7
200	6	7	8	8	8
100	7	9	10	11	11
50	9	12	13	14	15
300 vs. 300	5	6	7	8	8
200	5	7	8	9	9
100	7	9	10	11	11
50	9	12	14	15	15
200 vs. 200	6	8	9	10	10
100	7	10	11	12	12
50	9	12	14	15	15
100 vs. 100	8	11	13	14	14
50	10	14	16	17	17
50 vs. 50	12	16	18	13	20

For example, suppose one group of size 1,000 has a response of 34% "yes" for a question, and an independent group of size 100 has a response of 23% "yes" for the same question, for a difference of 11 percentage points. According to the table, this difference is subject to a potential sampling error of plus or minus 9 percentage points. Since the observed difference is greater than the potential sampling error, the observed difference is significant. Moreover, if the entire population were interviewed, the difference would be from 1 to 20 percentage points (the 11-point observed difference plus or minus the 9-point potential sampling error) in 95 cases out of 100.

Sampling error is only one way in which survey findings may vary from the findings that would result from interviewing every adult member of the population. Survey research is susceptible to human and mechanical errors as well, such as interviewer recording and data handling errors. However, the procedures used by the Harris firm keep errors of this kind to a minimum.

as companias del Partnership incluyen: Atelier International, Ltd., New York City; rayton International, Inc., NC; DesignTex abrics, Inc., Woodside, NY; Details, New ork City; Metropolitan Furniture Corporation, South San Francisco, CA; Stow & Davis Custom & Classics, Grand Rapids, I; y Vecta, Grand Prairie, TX.

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ouis Harris and Associates, Inc.

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当パートナーシップには以下の企業が参加しています：アテラー・インターナショナル社（ニューヨーク）、ブレイトン・インターナショナル社（ノースカロライナ州ハイポイント）、デザインテックス・ファブリックス社（ニューヨーク州ウッドサイド）、ディテールズ（ニューヨークシティ）、メトロポリタン・ファニチャー社（カリフォルニア州サウスサンフランシスコ）、ストー＆デービス・カスタム＆クラシックス（ミシガン州グランドラピッズ）、ヴェクタ（テキサス州グランドプレイリー）。

スチールケース輸出部門は、スチールケース社の製品を北米、ヨーロッパ、日本以外の国々の顧客向けにマーケティングおよびセールスを行っています。

ルイス・ハリス＆アソシエート社

ルイス・ハリス＆アソシエート社は、ビジネス、政府機関、協会や学会の責任者として決断を行う人々のための意見調査リサーチの分野におけるリーダーです。特に世論調査の分野の業績で知られるハリス社の組織は、過去30年以上にわたり米国の全州ならびに主要な大都市地域、そして世界60カ国において、意見調査を行ってきました。ハリス社の目標は、決断を行う責任者の方々が、関連するビジネス、市場、および産業に影響を与えるビジネス環境と社会的状況の広範な傾向を見極める援助を提供することです。

ビジネス・デザイナー協会

ビジネス・デザイナー協会（IBD）は、国際的に認められている、商業および組織機関のデザインを専門とするプロフェッショナル・インテリアデザイナーの組織です。当協会は1969年に設立され、４千100人以上の会員を擁しています。

IBDは、より高度のスタンダード設定の促進、教育プログラムの提供、適格なデザイン・プロフェッショナルの認定により公共の利益を保護する法案支持などを通して、プロフェッショナル・インテリアデザイナーの職業の向上に専心しています。

国際施設
マネージメント協会

国際施設マネージメント協会（IFMA）は1980年に、マネージメント・プロフェッショナルのための、推移する施設情報と教育のニースを満たすためのサポート組織として設立されました。施設マネージメントとは、物理的な職場をその組織の人員並びに仕事内容に対してコーディネートする業務です。IFMAの最も重要なゴールは、これら施設マネージメントのプロが業界の変化を予測し、また自己教育を進めるための援助を提供することです。当協会の１万人の会員の大部分は米国とカナダに位置し、IFMAはさらに、英国、フランス、ドイツ、日本、およびオランダの施設マネージメント協会と協力関係を結んでいます。

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